CITY OF GERMANTOWN
2011 COMMUNITY SURVEY

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Prepared For
The City of Germantown TN

By

Superior DataWorks

Strengthening Your Business With Market Research

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BACKGROUND

The City of Germantown is a residential community located in southeast Shelby County. With a population of 41,011, it is one of six municipalities adjacent to Memphis, Tennessee. Historically, the City has conducted a Community Survey to measure satisfaction with the City's delivery of a wide range of services, amenities, and programs, as well as provide direction for future growth and planning. Past community surveys have been conducted in 1995, 1999, 2000, and 2004.

The City of Germantown has commissioned Superior DataWorks, a full-service market research company located in Collierville, TN, to develop and implement the 2011 Community Survey, and provide analysis and a final report of all key findings of the research.

OBJECTIVES

The primary objective of this research is to measure residents' satisfaction with specific services, amenities, and programs that the City of Germantown oversees. Specifically, the research is designed to garner a better understanding of the following:

- ✓ City Government Services / Information Sources
  - Overall Rating of the City
  - Expectations/Ratings of Quality of Services Provided
  - Satisfaction with Overall City Services & Amenities
  - Information Sources about the City
- ✓ Quality of Living Attributes
  - Importance of General Lifestyle Attributes
  - Importance of City Service & Amenity Planning Attributes
- ✓ Emergency Services / Garbage Collection
  - Frequency of Usage of Police/EMS/Fire Departments
  - Smoke Detector Usage & Fire Education Program Participation
  - Disaster Notification Preference
  - Automated Traffic Enforcement Assessment
  - Location of Garbage Collection
  - Acceptability of Curbside Garbage Collection
- ✓ Community Amenities & Events
  - Usage of Recreational & Educational Facilities
  - Usage of Cultural & Community Events
  - Library Resource Allocation Preferences
  - Great Hall & Conference Center Assessment
- ✓ Internet & Cable TV
  - Internet Access / City Website Access
  - Online Transactions
  - Cable Access / Channel 17 Viewing
- ✓ Household Information
- ✓ Demographic Profiles

RESEARCH SCOPE & METHODOLOGY

SCOPE

As part of the overall implementation, Superior DataWorks has overseen the following components of the project, along with input and final approval from the City of Germantown:

- Survey Design
- Survey Invitations/Cover Letter
- Survey Printing/Programming
- Survey Distribution
- Returns of Undeliverable Mail/Email Addresses
- Collection of Completed Surveys
- Data Entry (including Data Cleaning/Verification
- Data Analysis
- Final Report

METHODOLOGY

Survey Design

In order to provide comparisons to the 2004 Community Survey, the survey instrument for this year's study mirrors the previous survey, although some minor changes have been made (i.e., some questions added, some deleted) to account for shifts in community focus. Approximately 100 questions have been included in the final survey.

Survey Sampling

As in 2004, surveys have been distributed to all households within the City of Germantown (including single family homes, condominiums, and apartments). In order to contain costs, however, only half of the outbound sample has been sent an invitation/cover letter with a paper (scannable) version of the survey to complete and return via prepaid envelope.

The other half has received an invitation/cover letter *only* that included an Internet link to complete the survey online. The online portion of the sample has been conducted this year for the first time in order to test the overall response rate for the online survey (vs. the paper version), and to determine if there are any significant differences to survey question responses between the two methods.

Sample Composition

Detail of the sample composition broken out by demographic segments can be found toward the end of the report on page 43.

METHODOLOGY (Continued)

Survey Distribution

Survey invitations have been issued via USPS, using the City of Germantown's mailing list (from the City's water billing database).

- Outbound Survey Distribution Date: **2/23/11**
- Inbound (Completed) Survey Stop Date: **3/14/11**

Survey Response Rates

Of the total 13,112 survey invitations issued, a total of 2,281 have been completed and returned to Superior DataWorks for processing and analysis. This total of 2,281 completed surveys provides a statistically valid sample from which to conduct full analysis on the data.

The final overall response rate for this project is 18%.

SURVEY RESPONSE RATES			
	TOTAL	PAPER	ONLINE*
Total Survey Invitations Mailed	13,112	6,556	6,556
Less Returns (Non-Deliverable Addresses)	375	192	183
Net Survey Invitations Delivered	12,737	6,364	6,373
Completed Surveys Returned for Processing	**2,281**	**1571**	**710**
Response Rate	**18%**	**25%**	**11%***

**Note: The lower response rate for the online segment probably is driven by the fact that respondents had to go to their computer and type in the survey link in their browser in order to access the survey. An email invitation issued directly to the residents' email address likely would have generated a higher response rate for the online segment.*

KEY FINDINGS

Following are *highlights* of the research findings. More information for all topics covered in the research can be found in the *Detailed Findings* section of the report.

Within the *Detailed Findings* section of the report, it is interesting to note some of the *significant differences* in ratings, usage, and preferences among the *demographic segments* for many of the topics covered, as differences often are seen – particularly among *age brackets* and *income brackets*, as well as in *households with and without children*. Some of these differences may provide more insight and better direction for future planning of City services and amenities.

OVERALL SATISFACTION / CITY GOVERNMENT SERVICES / INFORMATION SOURCES

❖ **Overall Satisfaction**

The City of Germantown is an *excellent place to live* – according to the majority of respondents (77%) – and this is up significantly from 2004 (70%).

❖ **City Government Services**

Expectation levels of the overall quality of services provided by City government also has increased significantly, with respondents saying they have *very high expectations* (58% vs. 49% in 2004).

Tracking with the high expectation levels, *ratings levels* of experiences with the City government's services *in the past 12 months* are up significantly – with a *very high* rating of 59% in 2011 vs. 51% in 2004.

❖ **City Services & Amenities**

Satisfaction with overall city services and amenities is very high. All of the 54 attributes measured receive a positive rating (somewhat/very satisfied) of 70% or higher, and about one-third of the attributes have a positive rating of 90% or higher. The top-rated attributes based on the most positive *mean scores* are:

- ✓ *Safety of living in G'town compared to other cities (mean of 1.21, 98% somewhat/very satisfied)*
- ✓ *Local availability of medical facilities/services (1.33, 95%)*
- ✓ *Effectiveness/professionalism of Fire Dept when called (1.33, 89%)*
- ✓ *Taste/smell/pressure of water (1.35, 93%)*
- ✓ *Response time of Fire Dept when called (1.35, 89%)*
- ✓ *Response time of Police Dept when called (1.37, 91%)*
- ✓ *Effectiveness/professionalism of EMS when called (1.42, 87%)*
- ✓ *Appearance/maintenance of street medians (1.43, 93%)*
- ✓ *Overall cleanliness/maintenance of City (1.43, 93%)*
- ✓ *Response time of EMS when called (1.43, 86%)*

Most have very low negative ratings (somewhat/very dissatisfied) of 5% or less. Only 4 of the 54 attributes have negative ratings of 10% or more:

- *Fairness/consistency of code and ordinance enforcement (15%)*
- *Maintenance/driving condition of City streets (12%)*
- *Visibility of Police in my neighborhood (10%)*
- *Effectiveness of commissions/boards as means for citizens to express opinions (10%)*

❖ **Information Sources**

There are three *primary sources* that respondents access – both *most often* and in *total mentions* – to locate information about the City:

- ✓ The *City Website* (36% most often, 68% total mentions)
- ✓ *The Commercial Appeal* (21%, 67%)
- ✓ The *Talk of the Town* (18%, 61%)

The Commercial Appeal remains flat vs. 2004, but both the *City Website* and the *Talk of the Town* are up significantly vs. 2004 (32% and 48%, respectively, for total mentions) as information sources.

QUALITY OF LIVING ATTRIBUTES

❖ **Importance of General Lifestyle Attributes**

The top-ranking *general lifestyle* attributes about living in the City of Germantown, based on their *level of importance*, center on *personal safety*, *emergency services*, and *property values*.

- ✓ *Low crime rate/Police services (1.07 mean score, 99% somewhat/very important)*
- ✓ *Fire/EMS services (1.25, 97%)*
- ✓ *Property values (1.29, 95%)*

There is no comparison to 2004, as this series of questions was not asked in the 2004 Survey.

❖ **Importance of City Service & Amenity Planning Attributes**

Respondents rank *retaining the residential character and appearance of the city* (mean score of 1.37) as the most important of the *city services and amenities* planning attributes. This measure's relative importance is significantly higher than any other attribute, and is the same as 2004 (1.38). Most of the remaining attributes also are virtually the same in 2011 vs. 2004.

EMERGENCY SERVICES / GARBAGE COLLECTION

❖ **Usage of Emergency Services**

About one-quarter of total respondents (24%) have used the Police Department one or more times in the past 12 months. This number is down slightly from 2004 (29%). Usage numbers are much smaller for the Fire Department (7%) and for EMS (9%). Of those who have used any emergency services in the past 12 months, most have used them only once.

❖ **Disaster Notification Preference**

Sirens are the preferred method of notification in the event of an emergency or natural disaster, with 94% of total respondents citing this method. Also receiving a very high percentage of mentions is *phone call* (80%).

❖ **Garbage Collection Location**

Just over half of total respondents (57%) say they have *curbside* garbage pickup. Of the 43% who currently have backyard garbage pickup, 54% say *curbside pickup would be acceptable* if they saw a *reduction in their fees of greater than 20%.*

COMMUNITY AMENITIES & EVENTS

- **<u>Recreational & Educational Facilities Usage</u>**

  Of the City of Germantown's *recreational and educational facilities*, *City Parks* are the most used. The majority of total respondents (83%) report having used them at least once in the past 12 months, compared to 78% in 2004.

  The *Germantown Library,* which was not included in the 2004 survey, is second in highest total usage in the past 12 months at 74%.

  The *Greenway* shows a significant increase in total usage over 2004 (from 39% to 52%).

  The *Germantown Athletic Club* (formerly the *Germantown Centre*) shows the sharpest decline in net usage (down to 35% vs. 58% in 2004).

- **<u>Cultural & Community Events Attendance</u>**

  Of Germantown's *cultural and community events*, *City Sponsored Events* (such as the *Holiday Parade* and *4th of July Fireworks*) are the most attended. Seven of ten total respondents (70%) say they *have attended one or more* of these in the past 12 months.

  In comparison, respondents are significantly less likely to have attended one or more performance at *GPAC*, the *Germantown Community Theatre*, the *Great Hall & Conference Center*, or the *Germantown Symphony*.

- **<u>Library Expansion & Resource Allocation</u>**

  Half of total respondents (50%) say they *do not support expansion* of the Germantown Library. Of those who support expansion, *collection expansion* (62%), *increased children's space* (60%), and *increased programming* (58%) are the primary reasons for expansion.

  Of the options presented, respondents prefer the *allocation of Library's resources* be toward *information databases* (54%) or *e-books* (42%).

  Half of total respondents (51%) say they *do **not** prefer to receive library information via social media* outlets (such as Texting, Twitter, or FaceBook). Another 33% are *unsure/don't know*. This is one measure that is particularly driven by age and income (i.e., older, less affluent respondents are much more likely to be *unsure* or *not prefer* the social media option, while those who prefer this method are much more likely to be younger and with higher household income).

- **<u>Great Hall & Conference Center</u>**

  Roughly one-quarter of total respondents (27%) are *unaware* of the *Great Hall & Conference Center*. Of the 73% who are aware of the facility, 86% feel it is an asset to the City.

INTERNET / ONLINE / CABLE

❖ **Internet Access / City Website Usage**

Internet access at home has increased significantly – with 96% of total respondents saying they currently have Internet access at home, compared with 87% in 2004.

Usage of the *City's website* also has increased significantly since 2004, with 79% of total respondents saying they have visited the City's website *at least once* (up from 56% in 2004). Usage frequency is up significantly, as well, from 35% in 2004 to 44% in 2011 for *occasionally/ frequently visit*.

❖ **Online Transactions**

The majority of total respondents are interested in making at least some types of online transactions with the City (via the Internet using a credit card). This is up significantly from 2004 – and likely is due to increased Internet access and usage at home, as well as awareness and trust of conducting business online (e.g., banking, retail, eBay, Amazon, etc.).

Those transactions respondents are most interested in making online are

- ✓ *Requesting utility service/utility service changes* (77%)
- ✓ *Registering for other Parks/Recreation programs* (76%)
- ✓ *Paying traffic fines* (73%)

❖ **Cable Access / Channel 17 Viewing**

About three-quarters of total respondents (78%) have Cable TV in their home. There is no comparison to 2004 data for this measure, as the question was not included in the 2004 Survey.

Of those with Cable TV in the home, only 37% of respondents say they watch Channel 17 (GHS-TV, Germantown's local cable access channel).

The following section of the report contains the *Detailed Findings of each question included in the 2011*, including comparisons to 2004 data (where applicable) and notations of *significant differences* among *demographic segments*.

Data broken out further by demographic segments can be found in the tables in the appendix.

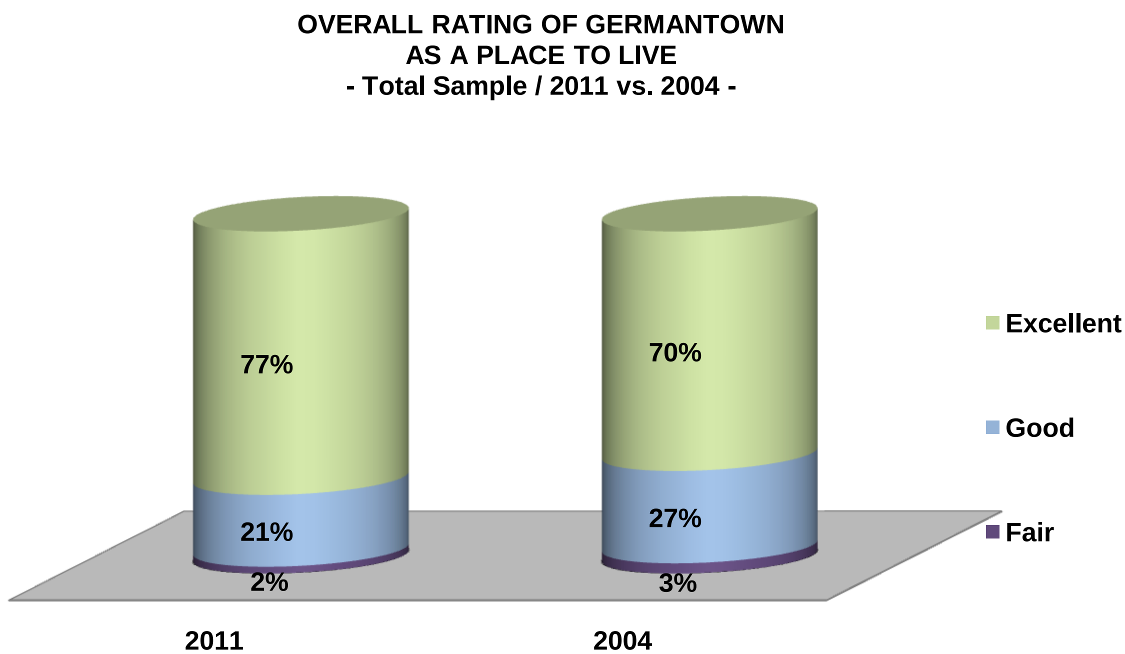
DETAILED FINDINGS

<u>Overall City Ratings</u> ***(Q58)***

Virtually all respondents (98%) rate the City of Germantown *excellent* or *good* as a place to live.

This total positive rating is unchanged vs. 2004 (97%), although *excellent* ratings have increased significantly from 70% in 2004 to 77% in 2011. No respondents rated the city *poor* on this measure.

Those respondents who have rate the City ***excellent*** as a place to live are *significantly* ***more*** *likely* to be in the *older age brackets* (60-69/70+), and have *lived in the city more than 10 years*.



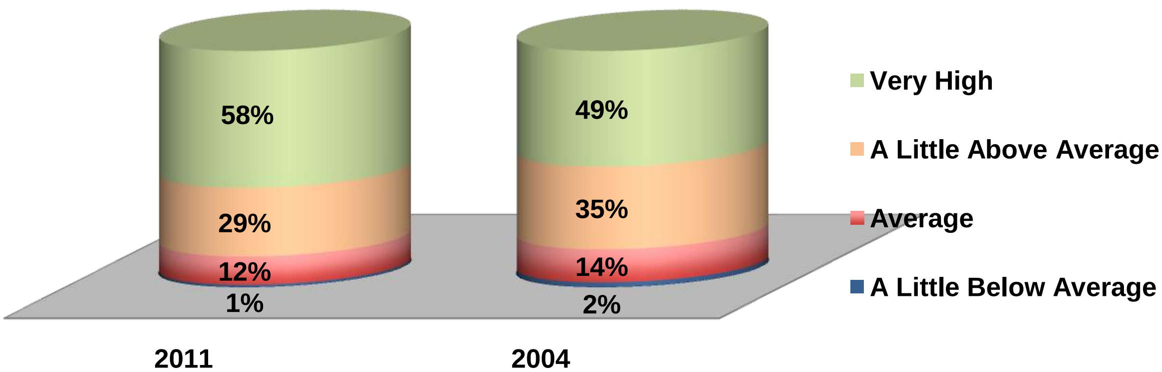
Q58: How would you describe the City of Germantown as a place to live? Base: Total Sample answering / 2011 n=2230, 2004 n=4674.

<u>Expectation Levels / Ratings Levels of Overall Quality of City Government Services</u> *(Q55/56)*

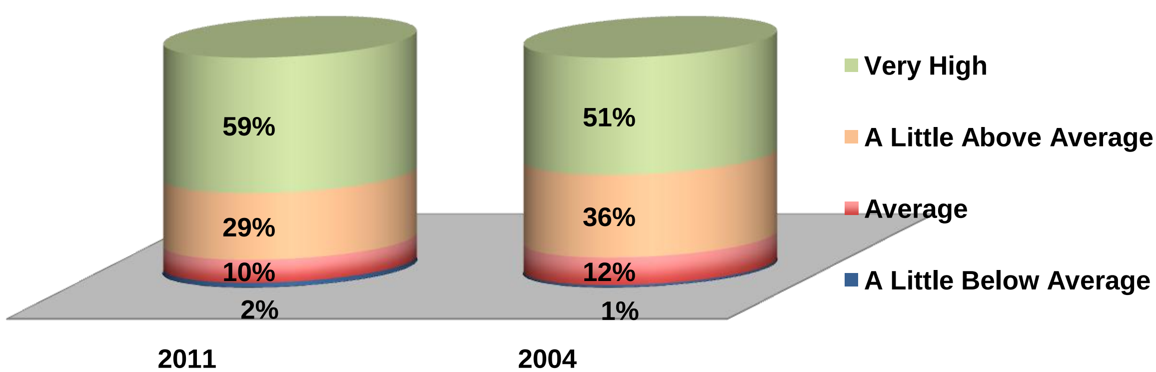
Expectation levels of the overall quality of services provided by the City of Germantown government have increased significantly in 2011 vs. 2004 (*very high* expectations at 58% vs. 49%). Similarly, past 12 months *ratings levels* also have increased significantly – *very high* rating up from 51% in 2004 to 59% in 2011.

Those respondents who have ***very high expectations and very high ratings*** are *significantly **more** likely* to be in the *older age bracket* (70+), have *adults only living in the household*, and have *lived in the city more than 10 years*.

EXPECTATIONS **OF OVERALL QUALITY OF CITY GOVERNMENT SERVICES**
<u>A Few Years Ago</u>
- 2011 vs. 2004 -



RATINGS **OF OVERALL QUALITY OF CITY GOVERNMENT SERVICES**
<u>In the Past 12 Months</u>
- 2011 vs. 2004 -



Q55: Thinking back a few years, recall your expectations of the overall quality of the services provided by the City of Germantown government. How would you rate your expectations <u>a few years ago</u> of government services? Base: Total Sample answering / 2011 n=2188, 2004 n=4460.
Q56: Please consider all of your experiences <u>in the past 12 months</u> with the City of Germantown government services. How would you rate the overall quality of the city of Germantown government services? Base: Total Sample answering / 2011 n=2211, 2004 n=4600.

<u>Confidence in City of Germantown Government</u> ***(Q57)***

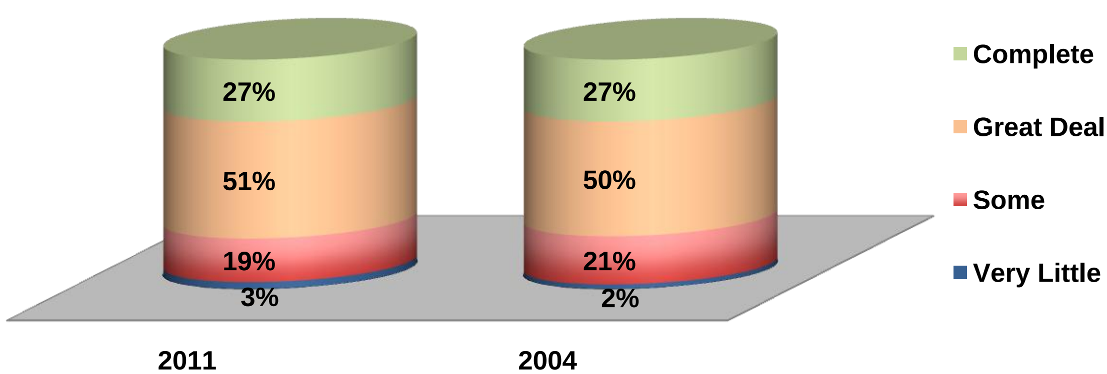
Confidence levels in the City of Germantown government are strong, with 78% of total respondents having a *great deal* or *complete* confidence in the people running City Hall.

These *confidence levels* remain unchanged in 2011 compared to 2004 (*complete confidence* at 27% / *great deal of confidence* at 51% and 50%, respectively).

Those respondents who have ***complete/great deal of confidence*** are *significantly* ***more*** *likely* to be in the *older age bracket* (70+).

Of the *very small* percentage (3%) that has ***very little/no confidence,*** these respondents are *significantly* ***more*** *likely* to be in the *middle/older age brackets* (40-49/50-59/60-69), in the *higher income bracket* ($150K), and have *lived in the City more than 10 years*.

LEVEL OF CONFIDENCE IN CITY GOVERNMENT
- 2011 vs. 2004 / Total Sample-



Q57: How much confidence do you have in the people running the City of Germantown government?
Base: Total Sample answering / 2011 n=2231, 2004 n=4612.

Overall City Services & Amenities Attributes / Satisfaction Level ***(Q1-54)***

Generally, total respondents' *satisfaction levels* with the City of Germantown's *overall services and amenities* remains very high. The majority of attributes show significant increases in the mean scores compared to 2004. For example, the top-ranked attribute in 2011 is the same as in 2004 – *safety of living in Germantown compared to other cities* – but the mean score has improved from 1.31 to 1.22 (lower score indicates higher level of satisfaction).

Significant differences among the demographic segments mean ratings for each attribute can be viewed separately in the appendix tables.

The complete listing of attributes rated is included in the table below, and continues on the following two pages**. *Note: The attribute number from the survey question is included in parenthesis (#) following each attribute listed.***

(Table 1 of 3)

OVERALL CITY SERVICES & AMENITIES ATTRIBUTES / SATISFACTION LEVELS
- 2011 Most to Least Comparisons / 2011 & 2004 Mean Comparisons -

ATTRIBUTE	RANK	*NA* % of Total*	TOP 2 BOX NET	SATISFACTION LEVEL - MOST TO LEAST - 1	2	3	4	5	MEAN SCORE 2011	2004
			%	%	%	%	%	%		
Safety of living in G'town compared to other cities *(43)*	1	*1*	**97**	82	15	3	0	0	**1.22**	**1.31**
Local availability of medical facilities/services *(23)*	2	*1*	**95**	74	21	4	1	0	**1.33**	**1.44**
Effectiveness/professionalism of Fire Dpt when called *(33)*	3	*44*	**89**	78	11	10	1	0	**1.33**	**1.45**
Taste/smell/pressure of water *(24)*	4	*1*	**93**	75	18	3	2	1	**1.35**	**1.44**
Response time of Fire Dept when called *(32)*	5	*43*	**89**	77	11	10	1	0	**1.35**	**1.52**
Response time of Police Dept when called *(36)*	6	*32*	**91**	75	16	8	1	1	**1.37**	**1.53**
Effectiveness/professionalism of EMS when called *(35)*	7	*48*	**87**	73	14	12	1	0	**1.42**	**1.55**
Appearance/maintenance of street medians *(18)*	8	*0*	**93**	68	25	4	2	1	**1.43**	**1.47**
Overall cleanliness/maintenance of City *(19)*	9	*1*	**93**	66	27	4	2	1	**1.43**	**1.50**
Response time of EMS when called *(34)*	10	*48*	**86**	73	13	13	1	1	**1.43**	**1.55**
Safety level walking alone in neighborhood anytime *(42)*	11	*2*	**93**	66	27	5	1	1	**1.44**	**1.57**
Maintenance of City parks/open spaces *(49)*	12	*2*	**93**	64	29	4	2	1	**1.46**	**1.56**
City gvt's overall job providing high quality services *(1)*	13	*2*	**93**	63	29	5	2	1	**1.47**	**1.52**
Overall quality of Germantown Library *(54)*	14	*11*	**91**	65	26	7	2	1	**1.48**	**NA**
Amount of land used for City parks/open spaces *(50)*	15	*2*	**91**	64	27	6	2	1	**1.49**	**1.59**
Courtesy/professionalism of Police officers *(41)*	16	*11*	**89**	66	23	7	2	1	**1.49**	**1.62**
Adequacy/maintenance of street name signs *(16)*	17	*0*	**91**	63	28	5	3	1	**1.51**	**1.74**
Skill of Police in prevention/reduction of crime *(40)*	18	*13*	**88**	58	30	10	2	1	**1.58**	**1.84**

*Q1-54: Considering only your experience within the past 12 months, please rate your level of satisfaction with each service described (#). On the scale, 1= VERY SATISFIED and 5=VERY DISSATISFIED. Satisfaction Level percentages based on those respondents answering each attribute (#). Means calculated on 1-5 ratings. Attributes listed from high to lower satisfaction ranking, based on MEAN score (score closer to 1 means greater importance) and TOP 2 BOX ratings. *NA: No answer/No opinion responses subtracted from sample base in calculating ranking percentages and means. Base: Total Sample answering / 2011 n=2243, 2004 n=4704.*

<u>Overall City Services & Amenities Attributes / Satisfaction Level</u> *(Q1-54)*

(Continued – Table 2 of 3)

Note on this page and on the following page, the GPAC attributes – *GPAC as a cultural asset to the City (44)* and *value of GPAC shows considering quality/variety of offerings (45)* – are the only two attributes to show any significant decrease in satisfaction levels (mean score comparison).

OVERALL CITY SERVICES & AMENITIES ATTRIBUTES / SATISFACTION LEVELS
- 2011 Most to Least Comparisons / 2011 & 2004 Mean Comparisons -

ATTRIBUTE	RANK	*NA* % of Total*	TOP 2 BOX NET	SATISFACTION LEVEL - MOST TO LEAST - 1	2	3	4	5	MEAN SCORE 2011	2004
			%	%	%	%	%	%		
GPAC as a cultural asset to the City *(44)*	19	*11*	**85**	62	23	10	3	2	**1.58**	**1.48**
Cleanliness of City streets *(14)*	20	*0*	**90**	58	32	6	4	1	**1.59**	**1.67**
Response to recycling collection services/requests *(31)*	21	*17*	**86**	61	25	11	3	1	**1.59**	**NA**
Adequacy/maintenance of street lighting *(17)*	22	*0*	**89**	58	31	5	4	2	**1.61**	**1.76**
Administrative leadership *(2)*	23	*7*	**87**	58	30	9	4	1	**1.61**	**1.63**
Accurate/consistent utility billing service *(26)*	24	*2*	**86**	59	27	9	4	1	**1.61**	**1.59**
Timeliness/professionalism of Parks/Recr employees *(51)*	25	*30*	**83**	60	23	14	2	1	**1.62**	**1.68**
Ease of travel by auto *(15)*	26	*0*	**88**	56	32	7	4	2	**1.63**	**1.78**
Response to water/sewer service requests *(25)*	27	*28*	**83**	60	23	13	2	2	**1.63**	**1.68**
Solid waste collection services *(28)*	28	*2*	**86**	57	29	7	5	2	**1.67**	**NA**
Response to solid waste collection services/requests *(29)*	29	*14*	**84**	57	27	10	5	2	**1.67**	**NA**
Timeliness/professionalism of City Hall employees *(5)*	30	*16*	**83**	55	29	13	3	1	**1.67**	**1.71**
Response to yard debris collection services/requests *(30)*	31	*12*	**84**	57	27	9	5	2	**1.68**	**NA**
Local availability of needed goods/services *(22)*	32	*3*	**85**	52	33	9	4	1	**1.69**	**1.79**
Availability/variety of recreation programs *(53)*	33	*20*	**83**	54	29	14	2	1	**1.69**	**1.74**
Clarity of info received re GPAC prog/performances *(48)*	34	*13*	**80**	55	25	16	3	1	**1.69**	**1.81**
Overall value of City services for my tax dollar *(6)*	35	*2*	**85**	49	36	9	4	1	**1.72**	**1.84**
Timeliness of info received re GPAC prog/perform *(47)*	36	*13*	**79**	54	26	17	3	1	**1.72**	**1.87**

Q1-54: Considering only your experience within the past 12 months, please rate your level of satisfaction with each service described (#). On the scale, 1= VERY SATISFIED and 5=VERY DISSATISFIED. Satisfaction Level percentages based on those respondents answering each attribute (#). Means calculated on 1-5 ratings. Attributes listed from high to lower satisfaction ranking, based on MEAN score (score closer to 1 means greater importance) and TOP 2 BOX ratings.
**NA: No answer/No opinion responses subtracted from sample base in calculating ranking percentages and means.*
Base: Total Sample answering / 2011 n=2243, 2004 n=4704.

Overall City Services & Amenities Attributes / Satisfaction Level *(Q1-54)*

(Continued – Table 3 of 3)

OVERALL CITY SERVICES & AMENITIES ATTRIBUTES / SATISFACTION LEVELS
- 2011 Most to Least Comparisons / 2011 & 2004 Mean Comparisons -

ATTRIBUTE	RANK	*NA* % of Total*	TOP 2 BOX NET	SATISFACTION LEVEL - MOST TO LEAST -					MEAN SCORE	
				1	2	3	4	5	2011	2004
			%	%	%	%	%	%		
Effectiveness of traffic law enforcement *(37)*	37	*5*	**83**	55	29	9	5	3	**1.73**	**1.83**
Effectiveness of Police in prevention of vandalism *(39)*	38	*14*	**82**	50	32	13	4	1	**1.74**	**1.99**
Coordination/management of City employees *(3)*	39	*25*	**80**	50	29	17	3	1	**1.75**	**1.77**
Quality/cost of recreation programs *(52)*	40	*28*	**79**	53	27	16	3	2	**1.75**	**1.81**
Budget/financial data available is easy to understand *(7)*	41	*19*	**80**	49	31	16	3	1	**1.76**	**1.85**
Value of GPAC shows considering quality/variety *(45)*	42	*16*	**78**	51	27	15	5	3	**1.81**	**1.72**
Usefulness of info on City's web page *(8)*	43	*23*	**79**	44	35	16	5	1	**1.83**	**1.97**
Responsiveness of elected officials *(4)*	44	*17*	**78**	47	31	16	4	2	**1.84**	**1.87**
Effectiveness of animal control/shelter services *(27)*	45	*24*	**78**	49	29	15	4	1	**1.84**	**2.01**
Maint of community values thru mgmt development *(21)*	46	*16*	**78**	46	32	15	5	2	**1.86**	**1.98**
Visibility of Police in my neighborhood *(38)*	47	*3*	**79**	45	34	11	7	3	**1.90**	**2.03**
Quant/variety of children's programs offered at GPAC *(46)*	48	*43*	**71**	46	24	23	5	2	**1.91**	**1.89**
City gvt's efforts to actively seek citizen input (MAC) *(9)*	49	*16*	**74**	45	29	19	5	3	**1.92**	**1.89**
Maintenance/driving conditions of City streets *(13)*	50	*1*	**80**	40	40	8	9	3	**1.96**	**1.93**
Effectiveness of MAC to communicate/resolve issues *(12)*	51	*29*	**72**	40	32	21	6	2	**1.97**	**2.04**
City's efforts to satisfy needs expressed by citizens *(10)*	52	*13*	**75**	39	36	16	6	3	**1.98**	**2.03**
Boards' effectiveness for citizens to express opinions *(11)*	53	*20*	**69**	37	32	21	7	3	**2.06**	**2.05**
Fairness/consistency of code/ordinance enforcement *(20)*	54	*16*	**70**	37	33	15	9	6	**2.15**	**2.09**

*Q1-54: Considering only your experience within the past 12 months, please rate your level of satisfaction with each service described (#). On the scale, 1= VERY SATISFIED and 5=VERY DISSATISFIED. Satisfaction Level percentages based on those respondents answering each attribute (#). Means calculated on 1-5 ratings. Attributes listed from high to lower satisfaction ranking, based on MEAN score (score closer to 1 means greater importance) and TOP 2 BOX ratings. *NA: No answer/No opinion responses subtracted from sample base in calculating ranking percentages and means. Base: Total Sample answering / 2011 n=2243, 2004 n=4704.*

<u>Information Sources about City of Germantown</u> *(70A/B)*

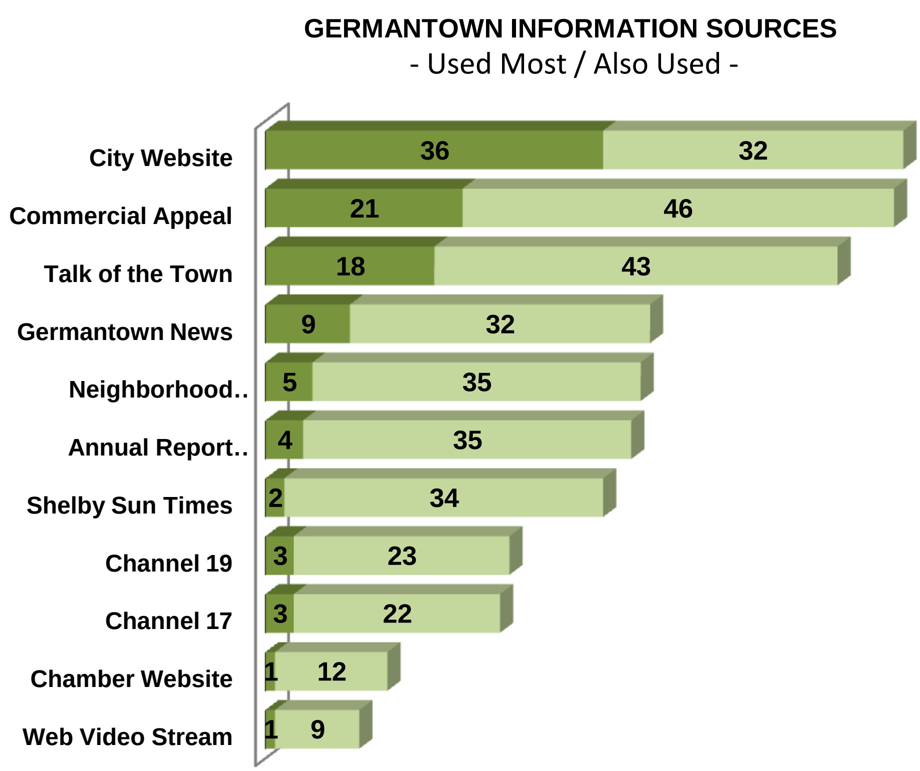
Of all the possible *sources of information* listed, three primary sources emerge as the ones these respondents go to – both most often and in total. The *City Website* (www.germantown-tn.gov) and *The Commercial Appeal* are cited most (68% and 67%, respectively), followed by the *Talk of the Town* (water bill insert) at 61%.

The *City Website* has moved up significantly from 32% in 2004 to 68% in 2011, and now shares the top spot with *The Commercial Appeal*. *Talk of the Town* remains in third position, although it also has increased significantly as an information source, as has *Neighborhood Associations*. *The Shelby Sun Times* shows the biggest drop (down to 36% in 2011 vs. 60% in 2004).

Those respondents who *use the* ***City Website*** are *significantly* ***more*** *likely* to be in the *younger/middle age brackets* (30-39/40-49/50-59), in the *middle income bracket* ($100-149K), have *children living in the household*, and have *lived in the City 10 years or less*.

Those respondents who *use* ***The Commercial Appeal*** are *significantly* ***more*** *likely* to be in the *middle/older age brackets* (50-59/60-69/70+), have *adults only living in the household*, and have *lived in the City more than 10 years*.

Those respondents who *use the* ***Talk of the Town*** *insert* are *significantly* ***more*** *likely* to be in the *older age brackets* (60-69/70+), in the *lower income bracket* (<$100K), and have *adults only living in the household*.



Net Any Used

2011 %	2004 %
68	32
67	64
61	48
41	46
40	24
39	30
36	60
26	21
25	19
13	4
10	4

Q70A/B: Which of the following sources do you use most/also to locate information about Germantown? Base: Total Sample answering / 2011 n=2202, 2004 n=4723. Multiple responses allowed.

<u>General Lifestyle Attributes / Importance Rankings</u> *(Q86)*

When asked to rank the *level of importance* on a variety of *general lifestyle* attributes about living in the City of Germantown, respondents grouped these into *three levels of relative importance* (based on mean scores and Top 2 Box scores). By far, the most important group of attributes center on *personal safety (low crime rate), emergency services*, and *property values*.

There is no comparison to 2004, as this series of questions was not asked in the 2004 Survey.

Significant differences among the 2011 demographic segments mean ratings for each attribute are included on the following page.

GENERAL LIFESTYLE ATTRIBUTES / IMPORTANCE RANKINGS
- 2011 Most to Least Comparisons / 2011 Means -

ATTRIBUTE	RANK	TOP 2 BOX NET	IMPORTANCE - MOST TO LEAST -					MEAN SCORE*	
			1	2	3	4	5	2011	2004
		%	%	%	%	%	%		
Low crime rate/Police services *(1)*	1	**99**	94	5	1	0	0	**1.07**	**NA**
Fire/Emergency medical services *(2)*	2	**97**	79	17	3	0	0	**1.25**	**NA**
Property values *(3)*	3	**95**	76	19	4	1	0	**1.29**	**NA**
Value of services for taxes paid *(12)*	4	**91**	65	26	8	1	0	**1.45**	**NA**
Schools *(7)*	5	**85**	69	16	10	2	3	**1.55**	**NA**
Responsive city government *(6)*	6	**89**	56	33	9	1	0	**1.57**	**NA**
Medical access *(4)*	7	**87**	55	33	11	2	0	**1.60**	**NA**
Established neighborhoods *(5)*	8	**80**	49	31	15	3	2	**1.78**	**NA**
Location *(8)*	9	**76**	47	29	18	3	3	**1.85**	**NA**
City amenities *(10)*	10	**72**	30	41	22	4	2	**2.06**	**NA**
Planned development *(11)*	11	**68**	35	32	21	7	4	**2.13**	**NA**
Arts and leisure activities *(9)*	12	**51**	18	34	32	11	6	**2.54**	**NA**

Q86 1-12: Please mark the level of importance for the following issues (#). On the scale, 1 is MOST important and 5 is LEAST important. High to low rankings based on MEAN score (score closer to 1 means greater importance) and TOP 2 BOX ratings. Base: Total Sample answering / 2011 n=2212.
*Note: *2004 mean scores not available / this series of questions not included in 2004 Survey.*

<u>General Lifestyle Attributes / Importance Rankings</u> ***(Q86)***

Significant differences among demographic segments rating each attribute are based on the *mean scores* for each attribute and are noted below, in order of importance rating. The attribute number from the survey is indicated by ***(#)*** before each attribute.

(1) There are no significant differences among demographic segments for respondents rating the importance of ***low crime rate/police services*****.**

(2) Those respondents who *rate* ***fire/emergency medical services*** *higher in importance* are *significantly* ***more*** *likely* to be in the *older age bracket* (70+), in the *lower income brackets* (<$100K, $100-149K), have *adults only living in the household*, and have *lived in the City more than 10 years*.

(3) There are no significant differences among demographic segments for respondents rating the importance of ***property values*****.**

(12) Those respondents who *rate* ***value of services for taxes paid*** *higher in importance* are *significantly* ***more*** *likely* to be in the *older age brackets* (60-69/70+), have *adults only living in the household*, and have *lived in the City more than 10 years*.

(7) Those respondents who *rate* ***schools*** *higher in importance* are *significantly* ***more*** *likely* to be in the *younger age brackets* (30-39/40-49), in the *lower/middle income brackets* (<$100K, $100-149K), and have *children living in the household*.

(6) Those respondents who *rate* ***responsive city government*** *higher in importance* are *significantly* ***more*** *likely* to be in the *older age bracket* (70+), in the *lower income bracket* (<$100K), have *adults only living in the household*, and have *lived in the City more than 10 years*.

(4) Those respondents who *rate* ***medical access*** *higher in importance* are *significantly* ***more*** *likely* to be in the *older age bracket* (70+), in the *lower income bracket* (<$100K), have *adults only living in the household*, and have *lived in the City more than 10 years*.

(5) Those respondents who *rate* ***established neighborhoods*** *higher in importance* are *significantly* ***more*** *likely* to be in the *older age bracket* (70+), in the *lower income bracket* (<$100K), have *adults only living in the household*, and have *lived in the City more than 10 years*.

(8) There are no significant differences among demographic segments for respondents rating the importance of ***location*****.**

(10) Those respondents who *rate* ***city amenities*** *higher in importance* are *significantly* ***more*** *likely* to be in the *older age bracket* (70+) and have *adults only living in the household*.

(11) Those respondents who *rate* ***planned development*** *higher in importance* are *significantly* ***more*** *likely* to be in the *older age bracket* (70+), have *adults only living in the household*, and have *lived in the City more than 10 years*.

(9) Those respondents who *rate* ***arts and leisure activities*** *higher in importance* are *significantly* ***more*** *likely* to be in the *older age bracket* (70+).

<u>City Services & Amenities Planning Attributes / Importance Rankings</u> *(Q59)*

When asked to rank the *level of importance* on a variety of *city services and amenities* attributes about living in the City of Germantown, respondents cite the *most important* attribute as *retaining the residential character and appearance of the city* (mean score of 1.37). This measure has significantly higher relative importance than any other attribute, and is unchanged vs. the 2004 mean score of 1.38.

Most of the remaining attributes also are virtually the same in 2011 vs. 2004, although a few attributes have changed significantly in their relative *level of importance*:

- Up significantly: *Expanding recreational facilities*
- Down significantly: *Retaining backyard garbage pickup*
  Increasing availability of senior housing options
  Increasing availability of smaller lot/moderately priced homes
  Increasing availability of large lot/single family homes

Significant differences among the 2011 demographic segments mean ratings for each attribute are included on the following page.

CITY SERVICES & AMENITIES PLANNING ATTRIBUTES / IMPORTANCE RANKINGS
- 2011 Most to Least Comparisons / 2011 & 2004 Mean Comparisons -

ATTRIBUTE	RANK	TOP 2 BOX NET	IMPORTANCE - MOST TO LEAST -					MEAN SCORE	
			1	2	3	4	5	2011	2004
		%	%	%	%	%	%		
Retaining residential character/appearance of city (11)	1	93	73	20	5	1	1	1.37	1.38
Improving pedestrian walkways/bike paths (7)	2	65	35	30	23	8	5	2.18	2.22
Improving traffic flow (1)	3	60	28	32	25	9	6	2.33	2.13
Increasing citizen involvement in city government (10)	4	57	21	35	35	6	3	2.33	2.21
Expanding recreational facilities (8)	5	49	19	30	35	11	6	2.55	2.72
Expanding “green” measures/programs (6)	6	52	23	29	27	11	11	2.57	NA
Expanding recreational programs (9)	7	45	17	28	37	12	6	2.63	2.69
Retaining backyard garbage pickup (12)	8	49	32	17	19	11	21	2.71	2.36
Increasing availability of senior housing options (4)	9	41	16	25	31	15	14	2.85	2.67
Increasing availability of public transportation (13)	10	26	11	15	27	17	30	3.40	3.34
Increasing availability of commercial/office structures (5)	11	22	6	16	30	21	26	3.45	3.50
Increasing availability of smaller lot/mod priced homes (3)	12	24	9	15	27	19	30	3.46	3.29
Increasing availability of large lot/single family homes (2)	13	23	8	15	29	20	29	3.47	2.76

Q59 1-13: Please mark the level of importance for the following issues (#). On the scale, 1 is MOST important and 5 is LEAST important. High to low rankings based on MEAN score (score closer to 1 means greater importance) and TOP 2 BOX ratings. Base: Total Sample answering / 2011 n=2212, 2004 n=4704.

<u>City Services & Amenities Planning Attributes / Importance Rankings</u> ***(Q59)***

Significant differences among demographic segments rating each attribute *(#)* are based on the *mean scores* for each attribute and are noted below, in order of importance rating. The attribute number from the survey is indicated by ***(#)*** before each attribute.

(11) There are no significant differences among demographic segments for respondents rating the importance of ***retaining residential character/appearance of the City*****.**

(7) Those respondents who *rate* ***improving pedestrian walkways/bike pathways*** *higher in importance* are *significantly* ***more*** *likely* to be in the *younger/middle age brackets* (30-39/40-49), in the *higher income brackets* ($150K+), have *children living in the household*, and have *lived in the City 10 years or less*.

(1) Those respondents who *rate* ***improving traffic flow*** *higher in importance* are *significantly* ***more*** *likely* to be in the *older age bracket* (70+), have *adults only living in the household*, and have *lived in the City more than 10 years*.

(10) There are no significant differences among demographic segments for respondents rating the importance of ***increasing citizen involvement in city government*****.**

(8) Those respondents who *rate* ***expanding recreational facilities*** *higher in importance* are *significantly* ***more*** *likely* to be in the *younger/middle age brackets* (30-39/40-49), have *children living in the household*, and have *lived in the City 10 years or less*.

(6) Those respondents who *rate* ***expanding the City's 'green' measures/programs*** *higher in importance* are *significantly* ***more*** *likely* to be in the *younger/middle age brackets* (30-39/40-49/50-59), and have *children living in the household*, and have *lived in the City 10 years or less*.

(9) Those respondents who *rate* ***expanding recreational programs*** *higher in importance* are *significantly* ***more*** *likely* to be in the *younger/middle age brackets* (30-39/40-49), have *children living in the household*, and have *lived in the City 10 years or less*.

(12) Those respondents who *rate* ***retaining backyard garbage pickup*** *higher in importance* are *significantly* ***more*** *likely* to be in the *older age brackets* (60-69/70+), in the *lower income bracket* (<$100K), have *adults only living in the household*, and have *lived in the City more than 10 years*.

(4) Those respondents who *rate* ***increasing availability of senior housing options*** *higher in importance* are *significantly* ***more*** *likely* to be in the *older age brackets* (60-69/70+), in the *lower income bracket* (<$100K), have *adults only living in the household*, and have *lived in the City more than 10 years*.

(13) Those respondents who *rate* ***increasing availability of public transportation*** *higher in importance* are *significantly* ***more*** *likely* to be in the *middle/older age brackets* (50-59/60-69/70+), in the *lower income bracket* (<$100K), and have *adults only living in the household*.

(5) Those respondents who *rate* ***increasing availability of commercial/office structures*** *higher in importance* are *significantly* ***more*** *likely* to be in the *older age brackets* (60-69/70+), have *adults only living in the household*, and have *lived in the City more than 10 years*.

(3) Those respondents who *rate* ***increasing availability of smaller lot/moderately priced homes*** *higher in importance* are *significantly* ***more*** *likely* to be in the *older age bracket* (70+), in the *lower income bracket* (<$100K), have *adults only living in the household*, and have *lived in the City more than 10 years*.

(2) Those respondents who *rate* ***increasing availability of large lot/single family homes*** *higher in importance* are *significantly* ***more*** *likely* to be in the *younger/middle age brackets* (30-39/40-49/50-59), in the *middle/upper income brackets* ($100-149K, $150K+), and have *children living in the household*.

<u>Emergency Services / Usage</u> *(Q60)*

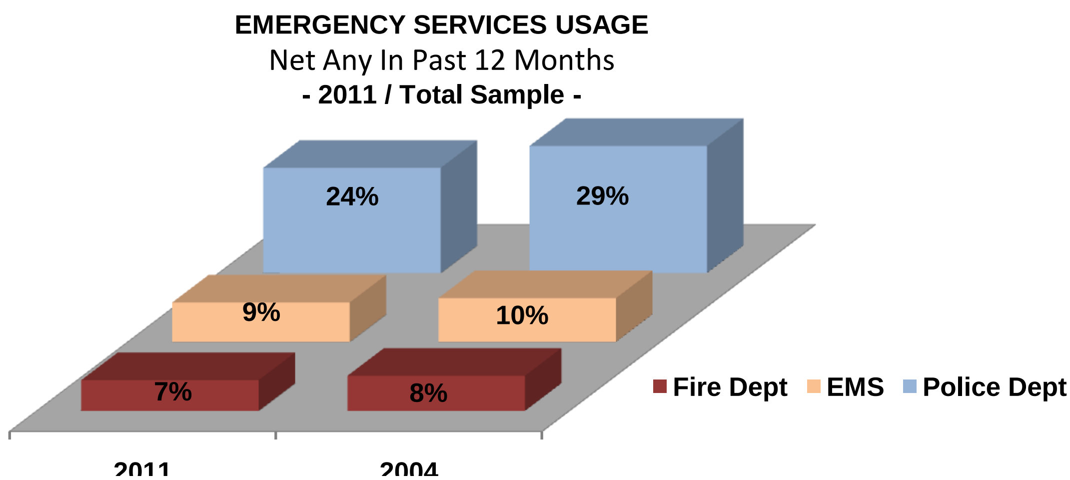
The majority of residents surveyed have ***not*** used the Police Department (76%), Emergency Medical Services (91%), or the Fire Department (93%) in the past 12 months. Of those respondents who have used any of these services, most have used them only once.

Net usage percentages are slightly lower for the Police Department vs. 2004. Usage of EMS and the Fire Department are virtually the same vs. 2004.

Those respondents who *have **not** used the **Police Department** in the past 12 months* are *significantly **more** likely* to be in the *older age brackets* (60-69/70+), in the *lower income bracket* (<$100K), have *adults only living in the household*, and either have *lived in the City less than 6 or more than 10 years*.

Those respondents who *have **not** used **EMS** in the past 12 months* are *significantly **more** likely* to be in the *younger/middle age brackets* (30-39/40-49/50-59), in the *middle income bracket* ($100-149K), have *children living in the household*, and have *lived in the City either less than one year or 6-10 years*.

There are no significant differences among the demographic segments of those respondents who *have **not** used the **Fire Department** in the past 12 months*.



EMERGENCY SERVICES / USAGE IN PAST 12 MONTHS - 2011 / Total Sample -			
	Police	EMS	Fire
Times Used	%	%	%
None	76	91	93
Net Any	24	9	7
1	18	7	6
2	4	1	1
3+	2	1	0

Q60/1-3: Within the past 12 months, how many times have you used the following services? Base: Total Sample answering / 2011 n=2202, 2004 n=4723. Multiple responses allowed.

<u>Smoke Detectors In Home</u> ***(Q81)***

Virtually all of total respondents (98%) report having a *working smoke detector* in their home.

There is no comparison to 2004 data for this measure, as this was not included in the 2004 survey.

There are no significant differences among the demographic segments for this measure.

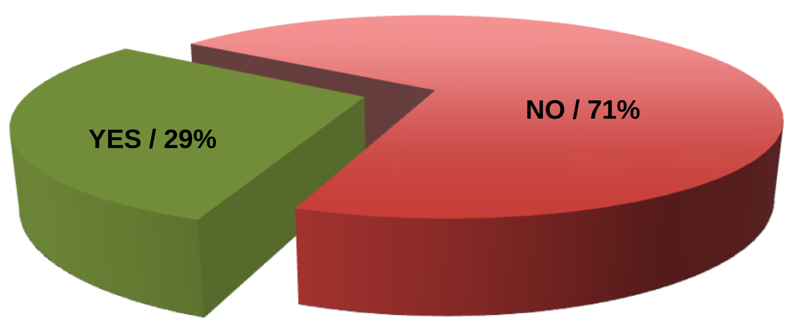
<u>Fire Education Program Participation</u> (Q82)

Slightly less than one-third of total respondents (29%) say that any member of their household has participated in any *fire education programs*.

There is no comparison to 2004 data for this measure, as this was not included in the 2004 survey.

Respondents who are *significantly* ***more*** *likely* to have had a member of the household participate in a *fire education program* are in the *younger/middle age brackets* (30-39/40-49/50-59), in the *middle/higher income brackets* ($100-149K, $150K+), and have *children living in the household*.

FIRE EDUCATION PROGRAM PARTICIPATION
- 2011 / Total Sample -



Q81: Do you have a working smoke detector in your home? Base: Total Sample answering / n=2234.
Q82: Has anyone in your household participated in any fire education programs? Base: Total Sample answering / n=2230.

<u>Disaster Notification Preferences</u> ***(Q71)***

Almost all respondents (94%) prefer to be notified *in case of emergency and/or natural disaster* via *sirens.* This high percentage, relative to the other choices, may be driven by the sense of familiarity with the sirens that have long been established in the area as a warning method for emergency events (e.g., for tornado warnings).

There is no comparison to 2004 data for this measure, as the question was not included in that year's survey.

Those respondents who *would like* ***sirens*** *as a method of emergency notification* are *significantly* ***more*** *likely* to be in the *older age bracket* (70+), have *adults only living in the household*, and have *lived in the City 6 years or more*.

Those respondents who *would like* ***a phone call*** *as a method of emergency notification* are *significantly* ***more*** *likely* to be in the *older age brackets* (60-69/70+).

Those respondents who *would like* ***a text message*** *as a method of emergency notification* are *significantly* ***more*** *likely* to be in the *younger/middle age brackets* (30-39/40-49/50-59), in the *middle/higher income brackets* ($100-149K/$150K+), have *children living in the household*, and have *lived in the City less than 10 years*.

There are no significant differences among the demographic segments of those respondents who *would like* ***an email message*** *as a method of emergency notification*.

EMERGENCY / NATURAL DISASTER PREFERRED WARNING METHODS - 2011 / Total Sample -	
METHOD OF NOTIFICATION	**Total Sample % Saying Yes**
Sirens	**94**
Phone Call (Home/Cell)	**80**
Text Message	**63**
Email	**55**
Do Not Notify Me	**2**

Q71: How would you like to be notified in a case of an emergency or natural disaster? Base: Total Sample answering / n=2077. Multiple responses allowed.

<u>Sanitation / Garbage Pickup Location</u> ***(Q72)***

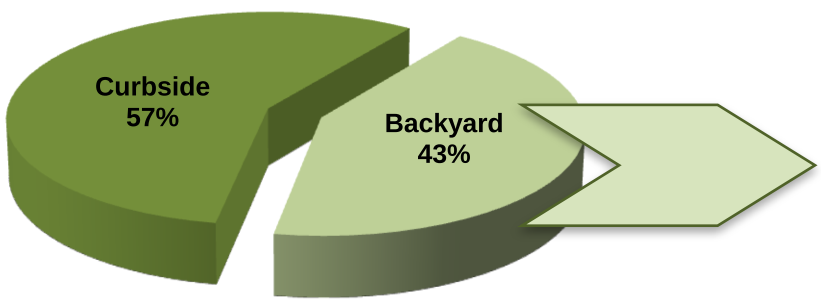
Slightly more than half of total respondents (57%) currently use *curbside* garbage pickup.

Of the 43% of total respondents who currently use *backyard* garbage pickup, more than half (54%) state *curbside* garbage pickup would be acceptable if there were a *reduction in their monthly fee of greater than 20%.*

There is no comparison to 2004 data for this measure, as the questions about garbage pickup location were asked differently in the 2004 survey (preferred vs. actual location).

Those respondents who ***currently use curbside pickup*** are *significantly* ***more*** *likely* to be in the *younger age brackets* (30-39/40-49), be in the *upper income brackets* ($100-149K, $150K+), have *children living in the household*, and have *lived in the City 10 years or less*.

CURRENT GARBAGE COLLECTION LOCATION
- 2011 / Total Sample -



Curbside Acceptable IF:

Monthly Fee Reduced By:	%
10%	10
20%	36
> 20%	54

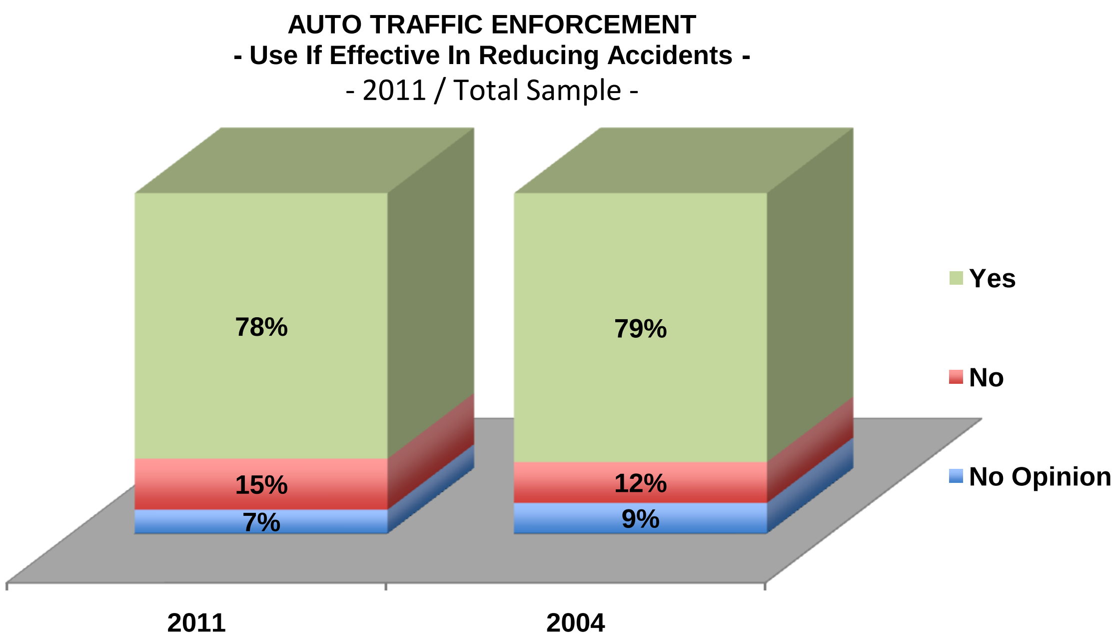
Q72: Which sanitation/garbage pickup location do you currently use? Base: Total Sample answering / n=2232.
Q73: Under what circumstances would you find curbside collection acceptable? Base: Those respondents with BACKYARD garbage pickup in Q72 / n=844.

<u>Automated Traffic Enforcement</u> *(Q75)*

The majority of total respondents (78%) feel the *automated traffic enforcement* (cameras at traffic signals) should be used if they are effective in reducing the number of accidents at the intersections.

There is no change among total respondents' opinion of the use of *automated traffic enforcement* at intersections compared to the 2004 survey.

The only significant difference among the demographic segments for this measure is respondents who have *lived in the City* for *more than 10 years* are *significantly **less** likely* to be in favor of this measure.



Q75: Regarding automated enforcement (cameras at traffic signals), do you think they should be used if they are effective in reducing the number of traffic accidents at intersections? Base: Total Sample answering / 2011 n=2230, 2004 n=4731.

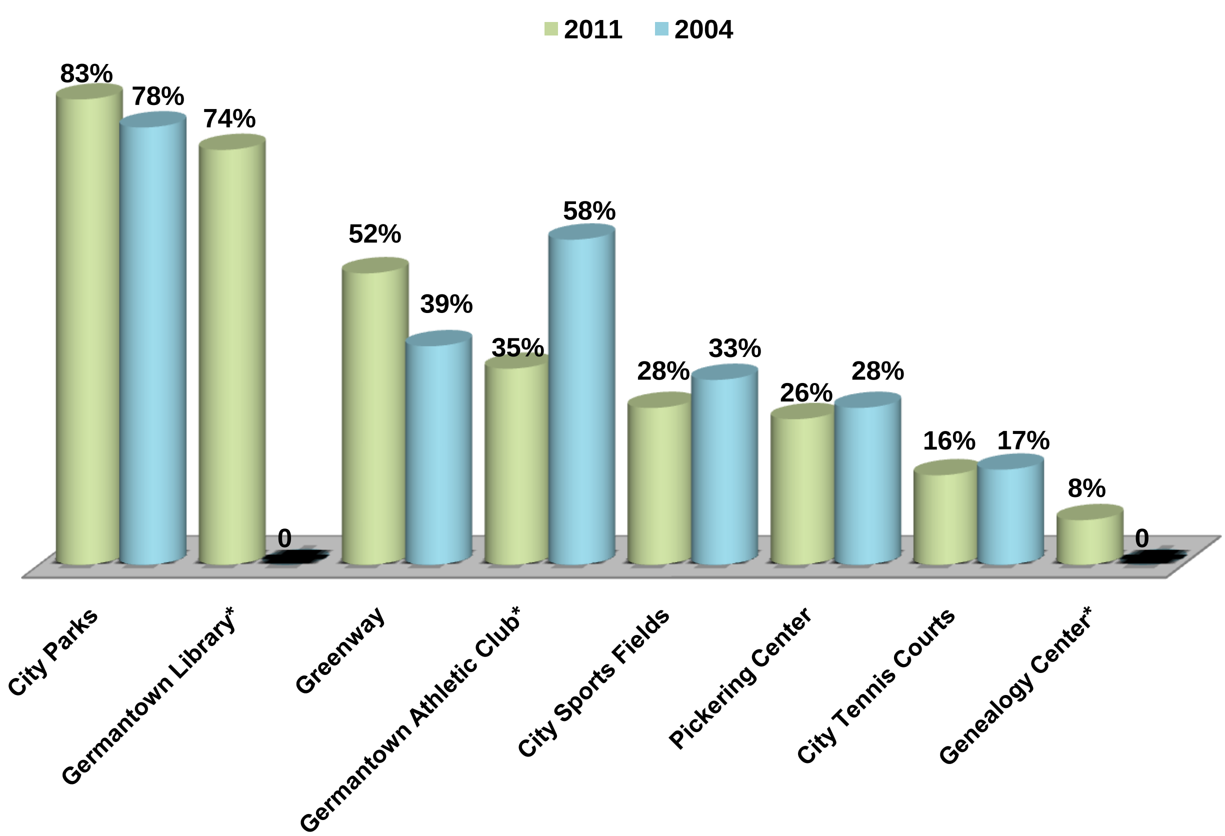
Recreational & Educational Facilities / Net Usage ***(Q61)***

The *City Parks* continue to be the most used of the City of Germantown's *recreational and educational facilities*, with 83% of respondents using them at least once in the past 12 months. This number is up slightly from 2004 (78%). The *Germantown Library* (not included in the 2004 survey) receives the second highest total usage in the past 12 months at 74%.

The *Greenway* shows the highest increase over 2004 (up from 39% to 52%), while the *Germantown Athletic Club* shows the sharpest decline in net usage (down to 35% vs. 58% in 2004).

Significant differences among the demographic segments for each event type are included on the following page.

RECREATIONAL & EDUCATIONAL FACILITIES / USAGE
- Net Any Visits in Past 12 Months / Total Sample -



Q61: Within the past 12 months, how many times have you used the following? Base: Total Sample answering / 2011 n=2220, 2004 n=4739. Multiple responses allowed.
*Notes: *The Germantown Library and the Genealogy Center not included in 2004 survey.*
***The Germantown Athletic Club called the Germantown Centre in the 2004 survey.*

<u>Recreational & Educational Facilities / Frequency of Usage</u> ***(Q61)***

There are a variety of significant demographic differences among the respondents who have **not** used each of the listed *recreational and educational facilities* in the City of Germantown. These differences are noted below for each facility:

Those respondents who *have **not** used the **City Parks** in the past 12 months* are *significantly **more** likely* to be in the *middle/older age brackets* (50-59/60-69/70+), in the *lower income bracket* (<$100K), have *adults only living in the household*, and have *lived in the City more than 10 years*.

Those respondents who *have **not** used the **Germantown Library** in the past 12 months* are *significantly **more** likely* to be in the *middle/older age brackets* (50-59/60-69/70+), have *adults only living in the household*, and have *lived in the City either less than 1 year or more than 10 years*.

Those respondents who *have **not** used the **Greenway** in the past 12 months* are *significantly **more** likely* to be in the *middle/older age brackets* (50-59/60-69/70+), in the *lower income bracket* (<$100K), have *adults only living in the household*, and have *lived in the City either less than 1 year or more than 10 years*.

Those respondents who *have **not** used the **Germantown Athletic Club** in the past 12 months* are *significantly **more** likely* to be in the *middle/older age brackets* (50-59/60-69/70+), in the *lower or higher income brackets* (<$100K, $150K+), have *adults only living in the household*, and have *lived in the City more than 10 years*.

Those respondents who *have **not** used the **City Sports Fields** in the past 12 months* are *significantly **more** likely* to be in the *middle/older age brackets* (50-59/60-69/70+), in the *lower income bracket* (<$100K), have *adults only living in the household*, and have *lived in the City either less than 1 year or more than 10 years*.

Those respondents who *have **not** used the **Pickering Center** in the past 12 months* are *significantly **more** likely* to be in the *younger age bracket* (30-39), in the *higher income bracket* ($150K+), and have *lived in the City less than 6 years*.

Those respondents who *have **not** used the **City Tennis Courts** in the past 12 months* are *significantly **more** likely* to be in the *middle/older age brackets* (50-59/60-69/70+), in the *lower income bracket* (<$100K), have *adults only living in the household*, and have *lived in the City more than 10 years*.

Those respondents who *have **not** used the **Genealogy Center** in the past 12 months* are *significantly **more** likely* to be in the *younger/middle age brackets* (30-39/50-59), in the *middle income bracket* ($100-149K), and have *lived in the City less than 6 years*.

Recreational & Educational Facilities / Frequency of Usage ***(Q61)***

In addition to being the most used overall of Germantown's *recreational and educational facilities*, the *City Parks* – along with the *Germantown Library,* the *Germantown Athletic Club,* and the *City Sports Fields* – have the highest *frequency of use* in the past 12 months among those respondents who use these facilities.

RECREATIONAL AND EDUCATIONAL FACILITIES / FREQUENCY OF USAGE
Past 12 Months
- 2011 / Total Sample -

Times Attended - Past 12 Months -	City Parks %	G'town Library %	Greenway %	G'town Athletic Club %	City Sports Fields %	Pickering Center %	City Tennis Courts %	Genealogy Center %
None	**17**	**26**	**48**	**65**	**72**	**74**	**84**	**92**
Net Any	**83**	**74**	**52**	**35**	**28**	**26**	**16**	**8**
1-6 Times	41	31	31	10	16	23	9	6
7-11 Times	14	13	9	3	4	1	3	0
12-23 Times	12	13	5	4	3	1	2	1
24+ Times	16	17	7	18	6	1	2	1
- 2011 / Those Who Have Used At Least Once -								
Net Any	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**
1-6 Times	**50**	**42**	**59**	**30**	**53**	**86**	**58**	**78**
7-11 Times	**17**	**19**	**16**	**8**	**16**	**7**	**20**	**7**
12-23 Times	**14**	**17**	**9**	**11**	**10**	**4**	**10**	**8**
24+ Times	**19**	**22**	**16**	**51**	**21**	**3**	**12**	**7**

Q61: Within the past 12 months, how many times have you used the following? Base: Total Sample answering / 2011 n=2220. Multiple responses allowed.

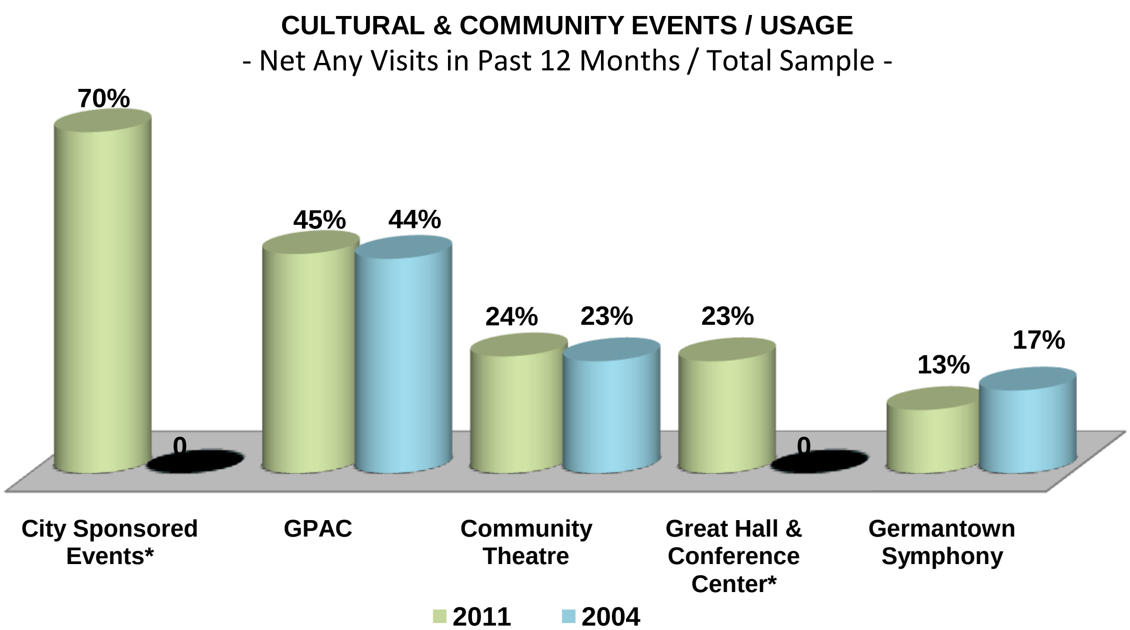
Cultural & Community Events / Net Usage ***(Q62)***

Germantown's *City Sponsored Events* (such as the *Holiday Parade* and *4th of July Fireworks*) are the most attended of the City's cultural and community event offerings, with 70% of total respondents reporting they *have attended one or more* of these in the past 12 months.

In comparison, respondents are significantly less likely to have attended one or more performance at *GPAC*, the *Germantown Community Theatre*, the *Great Hall & Conference Center*, or the *Germantown Symphony*.

There is virtually no change among these other events/venues compared to the 2004 survey.

Significant differences among the demographic segments for each event type are included on the following page.



Q62: Within the past 12 months, how many times have you attended the following? Base: Total Sample answering / 2011 n=2224, 2004 n=4701. Multiple responses allowed.
*Note: *City Sponsored Events and Great Hall & Conference Center not included in 2004 survey.*

Cultural & Community Events / Frequency of Usage ***(Q62)***

Germantown's *City Sponsored Events* (such as the *Holiday Parade* and *4th of July Fireworks*) – in addition to being the most attended of the City's cultural and community event offerings – also are the *most frequently attended*.

Those respondents who *have **not** attended* ***City Sponsored Events*** *in the past 12 months* are *significantly **more** likely* to be in the *middle/older age brackets* (50-59/60-69/70+), in the *lower or higher income brackets* (<$100K, $150K+), have *adults only living in the household*, and either have *lived in the City less than 1 year or more than 10 years*.

Those respondents who *have **not** attended* ***GPAC*** *in the past 12 months* are *significantly **more** likely* to be in the *younger age bracket* (30-39), in the *lower income bracket* (<$100K), and *have lived in the City less than 1 year*.

Those respondents who *have **not** attended the* ***Germantown Community Theatre*** *in the past 12 months* are *significantly **more** likely* to be in the *middle age bracket* (50-59), and have *lived in the City less than 6 years*.

There are no significant differences among demographic segments of respondents who *have **not** attended the* ***Great Hall & Conference Center*** *in the past 12 months*.

Those respondents who *have **not** attended the* ***Germantown Symphony Orchestra*** *in the past 12 months* are *significantly **more** likely* to be in the *younger/middle age brackets* (30-30/40-49/50-59), in the *middle income bracket* ($100-149K), and have *children living in the household,* and *have lived in the City 1-5 years*.

CULTURAL & COMMUNITY EVENTS / FREQUENCY OF USAGE
Past 12 Months
- 2011 / Total Sample -

Times Attended - Past 12 Months -	City Sponsored Events	Germantown Performing Arts Centre	Germantown Community Theatre	Great Hall & Conference Center	Germantown Symphony Orchestra
	%	%	%	%	%
None	**30**	**55**	**76**	**77**	**87**
Net Any	**70**	**45**	**24**	**23**	**13**
1-2 Times	51	32	19	19	11
3-5 Times	16	9	3	4	1
6+ Times	3	4	2	0	1
- 2011 / Those Who Have Attended At Least Once -					
Base: Net Any	**100**	**100**	**100**	**100**	**100**
1-2 Times	**73**	**70**	**78**	**83**	**84**
3-5 Times	**23**	**20**	**15**	**15**	**10**
6+ Times	**4**	**10**	**7**	**2**	**6**

Q62: Within the past 12 months, how many times have you attended the following?
Base: Total Sample answering / 2011 n=2224. Multiple responses allowed.
Frequency percentages based on NET ANY usage (Total Sample less Zero responses).

<u>Germantown Library / Reasons to Support Expansion</u> ***(Q63)***

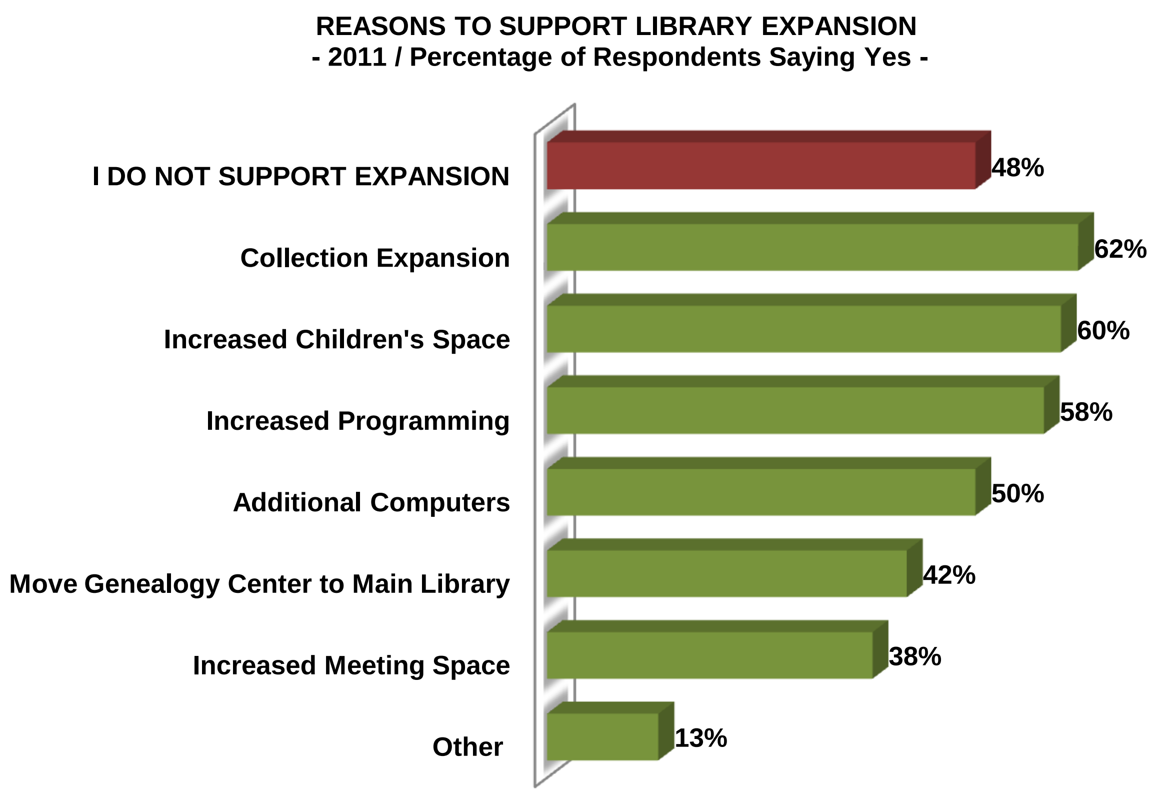
Roughly half of total respondents (48%) say they *do not support expansion* of the Germantown Library. Of those who support expansion, *collection expansion* (62%), *increased children's space* (60%), and *increased programming* (58%) are the primary reasons for expansion.

There is no comparison to 2004 data for this measure, as this was not included in the 2004 survey.

Those respondents who ***do not support expansion*** are *significantly **more** likely* to be in the *middle/older age brackets* (40-49/50-59/60-69/70+), in the *higher income bracket* ($150K+), have *adults only living in the household*, and have *lived in the City more than 10 years*.

Those respondents who ***support increased children's space*** **and** ***increased programming*** are *significantly **more** likely* to be in the *younger age brackets* (30-39/40-49), in the *middle income bracket* ($100-149K), have *children living in the household,* and have *lived in the City less than 10 years*.

Those respondents who ***support moving the Genealogy Center*** *to the main library* are *significantly **more** likely* to be in the *older age brackets* (60-69/70+) and in the *middle income bracket* ($100-149K).



Q63: Would you support expansion of the library facility for the following reasons?
Base = Total Sample answering / n=1219. Percentages based on those answering Yes for each attribute.

Germantown Library / Resource Allocation Preferences *(Q64)*

A slight majority of total respondents (54%) prefer the Germantown Library's resources be allocated toward *information databases*, followed closely by *e-books* (42%). Only 4% cite *language databases*.

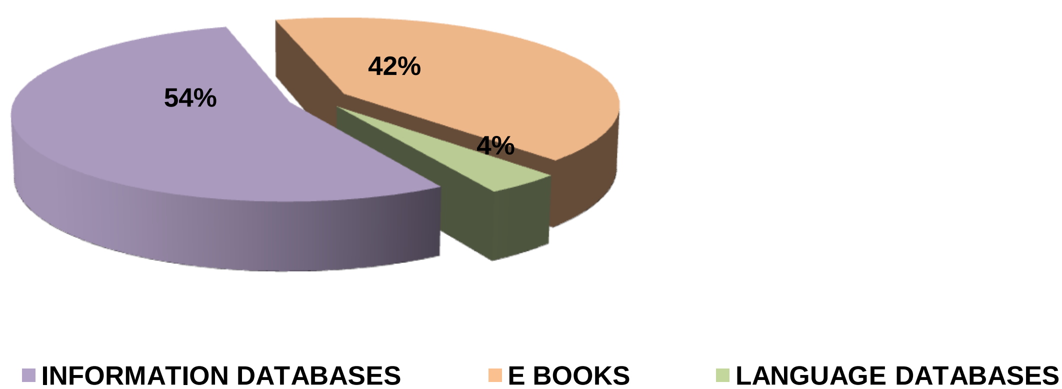
There is no comparison to 2004 data for this measure, as this was not included in the 2004 survey.

Those respondents who *prefer to allocate library resources toward* ***information databases*** are *significantly* ***more*** *likely* to be in the *older age brackets* (50-59/60-69/70+) and have *lived in the City more than 10 years*.

Those respondents who *prefer to allocate library resources toward* ***e-books*** are *significantly* ***more*** *likely* to be in the *younger age brackets* (30-39/40-49).

Those respondents who *prefer to allocate library resources toward* ***language databases*** are *significantly* ***more*** *likely* to be in the *lower income bracket* (<$100K) and have *children living in the household*.

LIBRARY RESOURCE ALLOCATION
- 2011 / Most Preferred Allocation -



Q64: Of the following, which do you most prefer the library's resources go towards? Base = Total Sample answering / n=893

<u>Library Info Via Social Media Source / Preference</u> *(Q74)*

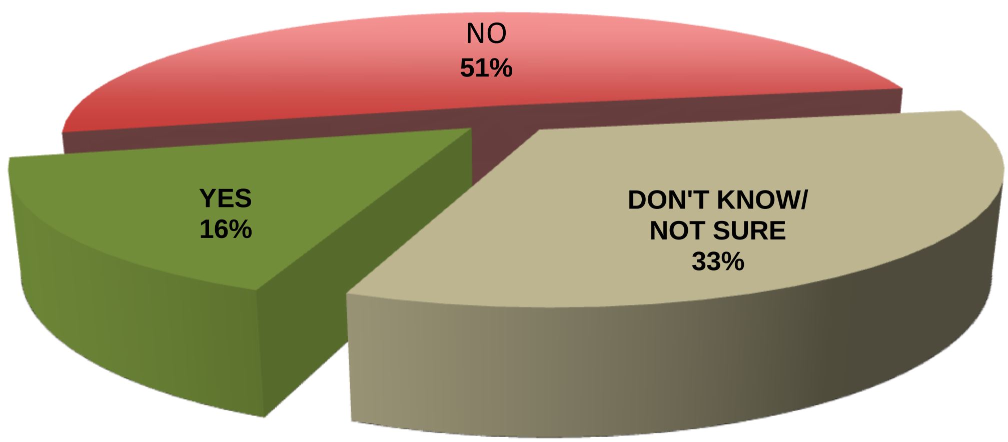
Half of total respondents (51%) say they *do **not** prefer to receive library information via social media* outlets (such as Texting, Twitter, or FaceBook). Another 33% are *unsure/don't know*, while only 16% of total respondents say social media is their *preferred* method of receiving library information.

There is no comparison to 2004 data for this measure, as this was not included in the 2004 survey.

Those respondents who ***prefer to receive library information via social media*** are *significantly **more** likely* to be in the *younger age brackets* (30-39/40-49), in the *higher income bracket* ($150K+), and have *children living in the household*.

Those respondents who ***are unsure about receiving library information via social media*** are *significantly **more** likely* to be in the *older age brackets* (60-69/70+), in the *lower income bracket* (<$100K), and have *adults only living in the household*.

PREFERENCE FOR SOCIAL MEDIA AS A SOURCE OF LIBRARY INFORMATION
[Such as Text/Twitter/FaceBook]
- 2011 / Total Sample -



Q74: Would you prefer to receive library information (e.g., card expiration, overdue notice) using social media, such as text messaging, Twitter, and FaceBook? Base: Total Sample answering / n=2224.

Great Hall & Conference Center As Asset to City *(Q65)*

Of total respondents, 27% are *unaware* of the *Great Hall & Conference Center*. Of the 73% who are aware of the facility, 86% feel it is an asset to the City.

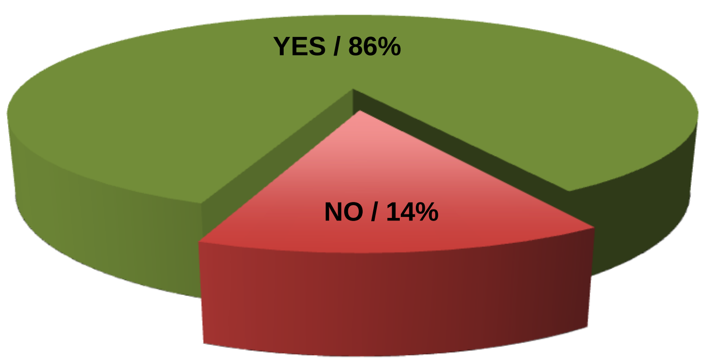
There is no comparison to 2004 data for this measure, as this was not included in the 2004 survey.

There are no significant differences among the demographic segments for this measure.

GREAT HALL & CONFERENCE CENTER AS ASSET TO CITY - 2011 / Total Sample -	
	%
YES / Is an Asset	63
NO / Is Not an Asset	10
UNAWARE OF FACILITY	27

Q65: Do you feel the Great Hall & Conference Center is an asset to the City? Base: Total Sample answering / n=2220.

GREAT HALL & CONFERENCE CENTER IS AN ASSET TO THE CITY
- 2011 / Those Aware of Facility -

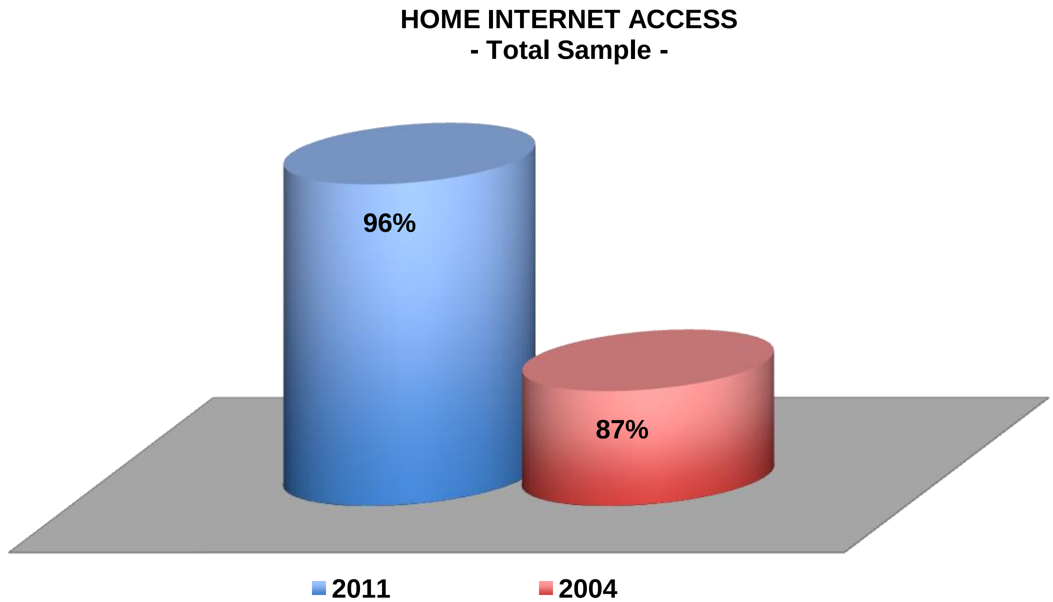


Q65: Do you feel the Great Hall & Conference Center is an asset to the City? Base: Those aware of facility / n=1623.

<u>Internet Access</u> (Q66)

Almost all of total respondents (96%) report having Internet access at home. This is up significantly from 87% in the 2004 survey.

Those respondents who ***have Internet access at home*** are *significantly* ***more*** *likely* to be in the *younger age brackets* (30-39/40-49), be in the *middle/higher income brackets* ($100-149K, $150K+), and have *children living in the household*.



Q66: Do you have Internet access at home? Base: Total Sample answering / 2011 n=2248, 2004 n=4530.

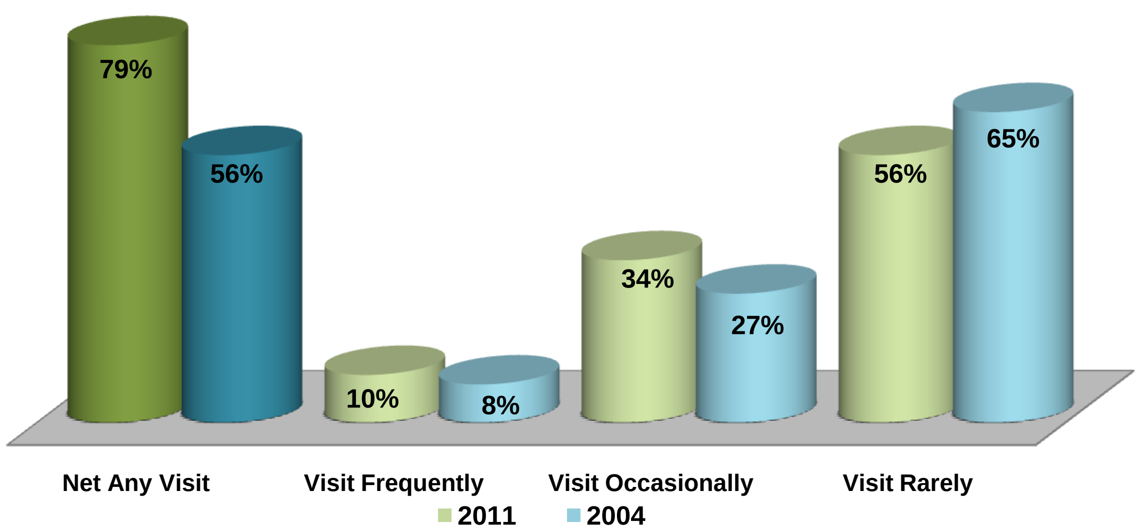
<u>City Website / Frequency of Visits</u> *(Q68)*

Roughly 8 of 10 total respondents (79%) say they *have visited the City of Germantown website* at least once. This measure also is up significantly from 2004 (56%).

Frequency of visits to the City's website has increased as well, with 44% of total respondents visiting the website *occasionally* or *frequently* – vs. 35% in 2004.

Those respondents who ***access the City website*** – either frequently or occasionally – are *significantly* ***more*** *likely* to be in the *younger age brackets* (30-39/40-49) and have *children living in the household*.

CITY WEBSITE NET VISITS / FREQUENCY OF VISITS
- Total Sample -



Q68: Please indicate how often you visit the City of Germantown website (www.germantown-tn.gov).
Base: Total Sample answering / 2011 n=2234, 2004 n=4640.
Frequency percentages based on NET ANY (Total Sample less Never responses).

<u>City Website / City Meeting Video Viewing</u> *(Q67)*

The majority of total respondents (84%) *have* ***not*** *watched* any videos of city meetings on the City's website. There is no comparison to 2004 data for this measure, as this was not included in the 2004 survey.

Those respondents who ***have watched videos of city meetings*** on the City's website are *significantly* more *likely* to be in the *older age brackets* (60-69/70+), have *adults only living in the household*, and have *lived in the City more than 10 years*.

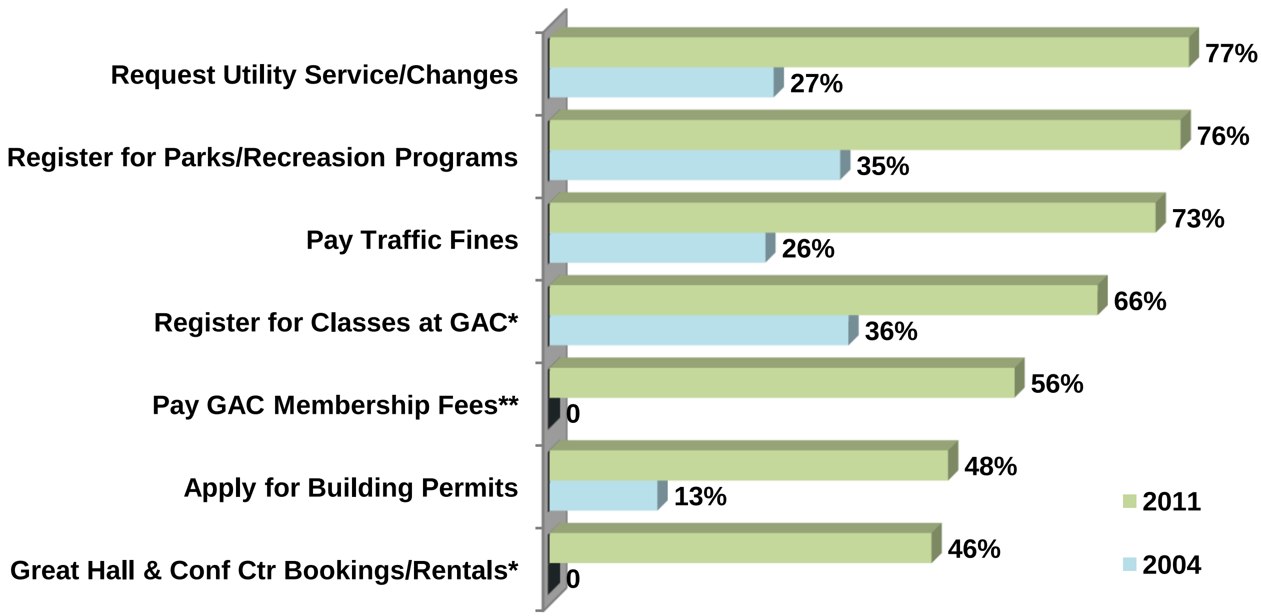
<u>Online Transactions With City Via Secured Site</u> *(Q69)*

Assuming data security is assured, the majority of total respondents are interested in making at least some types of online transactions with the City (via the Internet using a credit card). Those transactions respondents are most interested in making online are *requesting utility service/utility service changes* (77%), *registering for other Parks/Recreation programs* (76%), and *paying traffic fines* (73%).

These numbers are up significantly from 2004, likely due to increased overall awareness and trust of conducting business transactions via the Internet (e.g., banking, retail, eBay, Amazon, etc.).

Across all attributes, those respondents who are *significantly **less** likely* to have an interest in making online transactions with the City are in the *older age brackets* (60-69/70+), in the *lower income bracket* (<$100K), have *adults only living in the household*, and have *lived in the city more than 10 years*.

INTEREST IN ONLINE TRANSACTION TYPES WITH CITY VIA SECURED SITE
- Total Sample / Percentage of Respondents Saying Yes -



Q69: If data security is assured, what type(s) of transactions with the City would you be interested in making online (over the Internet using a credit card payment)? Base: Total Sample answering YES to each attribute / 2011 n=1358, 2004 n=4798. Multiple responses allowed.
*Notes: *Register for classes at GAC and Great Hall bookings/rentals not included in 2004 Survey.*
***GAC listed as Germantown Centre in 2004 Survey.*

Cable TV ***(Q83A)***

The vast majority of total respondents (78%) have *Cable TV* in their home. Interestingly, this number is significantly lower than those with *Internet access* in their home (96%, from Q66).

There is no comparison to 2004 data for this measure, as this was not included in the 2004 survey.

Respondents who are *significantly **more** likely* to have Cable TV in their home are in the *older age brackets* (60-69/70+), in the *higher income bracket* ($150K+), have *adults only living in the household*, and have *lived in the city more than 10 years*.

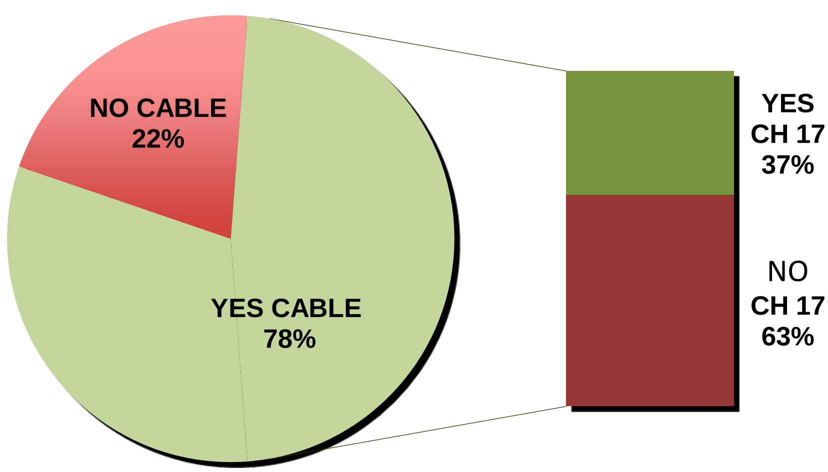
Channel 17 Viewing (Q83B)

Of those respondents who have *Cable TV* in their home, only 37% say they watch *Channel 17* (Germantown's local cable access channel, GHS-TV).

There is no comparison to 2004 data for this measure, as this was not included in the 2004 survey.

Respondents who are *significantly **more** likely* to watch Channel 17 (Germantown's local cable access channel, GHS-TV) are in the *older age brackets* (60-69/70+), in the *lower income bracket* (<$100K), have *adults only living in the household*, and have *lived in the city 6 or more years*.

CABLE TV IN HOME / CHANNEL 17 VIEWING
- 2011 / Total Sample -



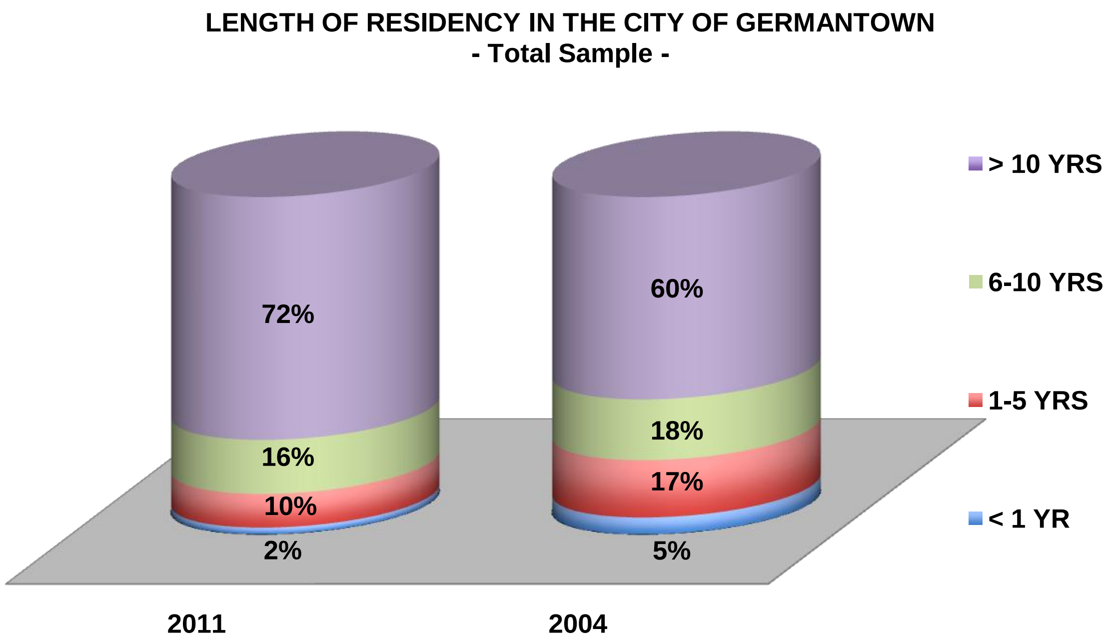
Q83A: Do you cable television in your home? Base: Total Sample answering / n=2237.
Q83B: Do you watch Germantown's local access TV station (GHS-TV, cable channel 17)?
Base: Those responding YES in Q83A / n=1722.

Length of Residency ***(Q76)***

The majority of total respondents (72%) have lived in the City of Germantown *more than 10 years*.

The percentage of respondents who are longer-term residents is up significantly from 2004 (60%), and *may* be indicative of a somewhat aging population in the City.

Respondents who have lived in the City *more than 10 years* are *significantly* ***more*** *likely* to be in the *older age brackets* (40-49/50-59, 60-69/70+), in the *lower income bracket* (<$100K), and have *adults only living in the household*.



Q76: How long have you lived in Germantown? Base: Total Sample answering / 2011 n=2250, 2004 n=4760.
Q77: What is your residence type? Base: Total Sample answering / n=2246.

Residence Type ***(Q77)***

Virtually all of total respondents (99%) declare their residence type as a *single family house that they own* (i.e., not renters). This is up slightly from 2004 (92%).

Location of Residence ***(Q78)***

The geographic distribution of the total sample is slightly lopsided, with 65% of total respondents living *north of Poplar Avenue*, but all quadrants remain virtually the same compared to 2004.

Quadrant 1 respondents are *significantly* ***more*** *likely* to be in the *older age bracket* (70+), in the *lower/middle income brackets* (<$100K, $100-149K), and have *adults only living in the household*.

Quadrant 2 respondents are *significantly* ***more*** *likely* to be in the *middle age brackets* (40-49/50-59), in the *middle/higher income brackets* ($100-149K, $150K+), and have *children living in the household*.

Quadrant 3 respondents are *significantly* ***more*** *likely* to be in the *middle/older age brackets* (50-59/60-69,70+), in the *lower/middle income brackets* (<$100K, $100-149K), and have *adults only living in the household*.

Quadrant 4 respondents are *significantly* ***more*** *likely* to be in the *higher income bracket* ($150K+), and have *adults only living in the household*.

LOCATION OF RESIDENCE
- Total Sample -

QUAD	GEOGRAPHIC BOUNDARIES	2011 %	2004 %
1	North of Poplar Ave/West of Kimbrough Rd	26	28
2	North of Poplar Ave/East of Kimbrough Rd	39	39
3	South of Poplar Ave/West of Hacks Cross Rd	18	18
4	South of Poplar Ave/East of Hacks Cross Rd	17	15

Q78: In what area of town do you reside? Base: Total Sample answering / 2011 n=2216, 2004 n=4633.

Plan to Live in Germantown in 10 Years *(Q79)*

The majority of total respondents (84%) see themselves living in Germantown 10 years from now. This percentage is up slightly from 2004 (79%).

Those respondents who ***envision living in Germantown in 10 years*** are *significantly **more** likely* to be in the *younger or older age brackets* (30-39/40-49/70+).

ENVISION LIVING IN GERMANTOWN IN 10 YEARS - Total Sample -		
	2011	**2004**
	%	**%**
YES	**84**	**79**
NO	**16**	**21**

Q79: Do you see yourself living in Germantown 10 years from now? Base: Total Sample answering / 2011 n=2246, 2004 n=4426.

Anticipated Retirement Location *(Q80)*

Slightly more than one-third of total respondents (35%) are unsure about where they plan to retire. Of the 65% who name a location, one-third (34%) are *already retired* and 44% plan to retire *in Germantown*. The remaining 22% say they plan to retire *outside of Germantown*.

These percentages are virtually unchanged compared to 2004.

Those respondents ***already retired*** are *significantly **more** likely* to be in the *older age brackets* (60-69,70+), in the *lower/middle income brackets* (<$100K, $100-149K), and have *adults only living in the household*.

Those respondents who ***plan to retire in Germantown*** are *significantly **more** likely* to be in the *middle/older age brackets* (50-50/60-69/70+) and in the *middle/higher income brackets* ($100-149K, $150K+).

Those respondents who ***plan to retire outside Germantown*** are *significantly **more** likely* to be in the *younger/middle age brackets* (30-30/40-49/50-59), in the *middle/upper income brackets* ($100-149K, $150K+), and have *children living in the household*.

ANTICIPATED RETIREMENT LOCATION - Total Sample -		
	2011	**2004**
	%	**%**
Don't Know/Not Sure	**35**	**38**
Net Any Answer	**65**	**62**
Already Retired	**34**	**34**
In Germantown	**44**	**44**
Outside Germantown	**22**	**22**

Q80: Where do you plan to retire? Base: Total Sample answering / 2011 n=2221, 2004 n=4717.

Children in Household / Age Breaks *(Q91)*

Of the total sample, 39% of respondents report at least one child under the age of 19 living in the household.

No direct comparison can be made to the 2004 Survey for this measure.

CHILDREN IN HOUSEHOLD / AGE BREAKS - 2011 / Households With Children 18 or Younger -	
	%
Net Any Children	**100**
0-4 Years	**29**
5-10 Years	**43**
11-14 Years	**38**
15-18 Years	**39**

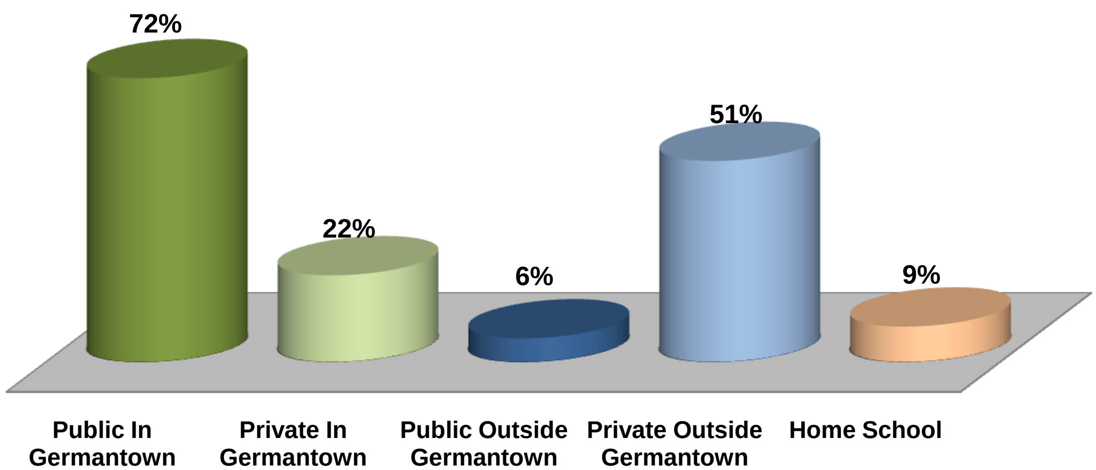
Q91: How many people live in your household in each of the following age brackets? Base: Respondents with 1+ children in household / 2011 n=685. Multiple responses allowed.

Children in Household / School Type & Location *(Q92)*

Of the respondents with children under the age of 19 living in the household, the majority of total households (72%) report *one or more child* attending *public school in the City of Germantown*. The same percentage of total households (73%) have one or more child *attending private school* - either *in Germantown* (22%) or *outside Germantown* (51%).

No direct comparison can be made to the 2004 Survey for this measure.

SCHOOL TYPE & LOCATION
Net Any Children Attending
- 2011/ Households With Children 18 or Younger -



Q92: If children high school age or younger currently live in your household, please indicate how many attend in each of the following school categories? Base: Total Sample answering / n=770. Multiple responses allowed.

Sample Composition / Demographics ***(Q89/Q93/Q76/Q91)***

The total respondent sample of 2,281 is broken down into the following demographic categories: *age, household income, length of residency*, and *household composition*. These demographic segments have been analyzed, and significant differences among each segment have been noted (where applicable) for each question in the survey.

SAMPLE COMPOSTION / DEMOGRAPHICS
By Total / By Age / By Household Income

TOTAL *n=2281*	AGE BRACKETS *n=2212*						HOUSEHOLD INCOME *n=1724*		
	20-29	30-39	40-49	50-59	60-69	70+	<$100K	$100-149K	$150K+
%	%	%	%	%	%	%	%	%	%
100	1	9	17	26	27	20	36	28	36

SAMPLE COMPOSTION / DEMOGRAPHICS
By Total / By Length of Residency / By Household Composition

TOTAL *n=2281*	LENGTH OF RESIDENCY *n=2250*				HOUSEHOLD COMPOSITION *n=2188*	
	< 1 YR	1-5 YRS	6-10 YRS	> 10 YRS	ADULTS ONLY	ADULTS & KIDS
%	%	%	%	%	%	%
100	2	10	16	72	61	39

Sample Composition / Demographics ***(Q88/Q90/Q94)***

In addition to the above segments, the following demographic segments are noted but have not been included in further analysis.

SAMPLE COMPOSTION / DEMOGRAPHICS
By Total / By Ethnicity / By Gender / By Education Level

TOTAL *n=2281*	ETHNICITY *n=2182*					GENDER *n=2212*		EDUCATION LEVEL *n=2164*			
	White	Black	Asian	Hisp	Other	M	F	High School Or Less	Some College	College Grad	Grad/Prof Degree
%	%	%	%	%	%	%	%	%	%	%	%
100	95	1	2	1	1	51	49	4	15	40	41

OPEN END QUESTIONS

Most Important Issue Facing Germantown *(Q84)*

The majority of respondents (83%) provided some answer to this question. *School consolidation* is top-of-mind, and is reported by 52% of total respondents providing an answer to this question to be the *single most important issue* facing the City of Germantown presently.

A full list of respondent comments for this question can be found in the appendix.

MOST IMPORTANT ISSUE FACING GERMANTOWN - 2011 /Total Sample Providing Response -	
ISSUE	**%**
School Consolidation/Issues	**52**
Current Tax Rates	**17**
Crime/Safety	**12**
Protecting Lifestyle	**8**
Growth	**7**
Education System	**6**
Current Property Values	**6**
All Other Mentions	***< 5% Each***

Q84: What is the single most important issue facing Germantown? Base: Total Sample answering / n=1903. Multiple responses tabulated.

Like Least About Living in Germantown *(Q85)*

Only 59% of total respondents answered this question (n=1343/2281). Other than wanting more *upscale restaurants/farmers' market*, complaining about *traffic congestion/traffic cameras*, *code restriction enforcement, proximity to Memphis*, and *taxes*, the majority of mentions is a long list of random items.

A full list of respondent comments for this question can be found in the appendix.

LIKE LEAST ABOUT LIVING IN GERMANTOWN - 2011 / Total Sample Providing Response -	
ISSUE	**%**
Need More Upscale Restaurants/Farmers Market	**13**
Poplar Corridor/Gtown Pkwy Traffic	**12**
Traffic Lights/Cameras	**10**
Nothing/Happy Living Here	**9**
Code Restrictions Enforcement	**9**
Proximity to Memphis	**9**
Taxes	**6**
All Other Mentions	***< 5% Each***

Q85: What do you like least about living in Germantown? Base: Total Sample answering / n=1903. Multiple responses tabulated.

Additional Comments *(Q92)*

Only 36% of total respondents answered this question (n=825/2281). A full list of respondent comments for this question can be found in the appendix.